EBOOK

How to Rapidly Standardize Technology and Processes After Acquisition

A Playbook for Accounting Firms

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00 Introduction

> "There are a lot of reasons why firms go through the M&A process, and IT needs to be more than an afterthought."
>
> ROMAN KEPCZYK, DIRECTOR OF FIRM TECHNOLOGY STRATEGY, RIGHTWORKS

The Explosion of M&A Activity in Accounting

The accounting profession is experiencing unprecedented consolidation. According to *CPA Trendlines Research*, over 90 significant PE-related transactions have occurred from 2020 through 2025, with private equity pouring over $50 billion in new capital into CPA firms over the last six years. The collective valuation of these firms is estimated at $200 billion.

This surge isn't just about scale—it's about transformation.

However, while dealmakers focus on financial synergies, a critical factor often gets overlooked: **technology**.

90+
PE-related transactions (2020-2025)

$50B
new capital invested in CPA firms

$200B
collective valuation

The Hidden Challenge: Disparate Tech Stacks Slowing Post-Acquisition ROI

Harvard Business Review research shows that 70% of mergers fail—and IT integration is consistently cited as a primary culprit.

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of mergers fail

When accounting firms merge, they bring together:

- **Hundreds of applications**
- **Different hosting environments**
- **Varied cybersecurity maturity levels**
- **Incompatible workflows and processes**
- **Significant disparities in technological adoption and user sophistication**

Without standardization, firms face hidden costs that can hemorrhage hundreds of thousands of dollars—and even greater losses in productivity and missed efficiency gains from consolidation—within the first year alone.

> "Firms must standardize as quickly as possible to realize merger benefits."
>
> ROMAN KEPCZYK, DIRECTOR OF FIRM TECHNOLOGY, RIGHTWORKS

What This Guide Covers

This guide provides a step-by-step roadmap for standardizing your technology stack post-acquisition. You'll learn:

Chapter 1: Why Standardization Is Critical for Post-Merger ROI

Chapter 2: Post-Acquisition Tech Conflicts & How to Standardize Your Stack

Chapter 3: Managing the Human Side of Technology Standardization

Chapter 4: How to Create a Repeatable Framework for Future Acquisitions

01

Why Standardization Is Critical for Post-Merger ROI

Technology standardization isn't just about operational efficiency—it's the difference between achieving promised merger returns and watching value evaporate through hidden costs and inefficiencies.

The Real Cost of Delayed Standardization

When firms delay technology standardization, they face compounding costs that directly impact ROI.

DOUBLE LICENSING EXPENSES:
Maintaining duplicate software across merged entities can create six-figure surprises. For example, an acquired practice with a two-year contract on high-end CRM solutions that will not be used in the combined entity may be forced to pay for systems they're no longer using.

LOST BILLABLE HOURS:
Without standardized platforms, firms cannot share work across their additional headcount, forcing each location to operate independently rather than leveraging combined resources.

PREVENTED CROSS-TRAINING:
Different systems mean staff can't cover for each other effectively, reducing flexibility and increasing labor costs during busy seasons.

Private Equity's Proven Approach

PE-backed firms demonstrate the ROI impact of rapid standardization. Private equity firms optimize their investments by minimizing risk through standardization as much as possible.

> "The worst demerger I ever went through was they didn't adhere to the one-year rule."
>
> ROMAN KEPCZYK, DIRECTOR OF FIRM TECHNOLOGY STRATEGY, RIGHTWORKS

THEIR SUCCESS METRICS SHOW:

Single-Day Integration Capability
Standardized technology allows acquired firms to be operational immediately.

Reduced IT Overhead
Eliminating duplicate systems and contracts.

Scalable Growth
Platform architecture that handles aggressive expansion without additional infrastructure costs.

The One-Year Rule

Industry best practice calls for complete standardization within 12 months and preferably within 6 months. When firms let acquired practices continue using their own applications beyond this timeframe:

6 MONTHS
Review processes continue to be inefficient across different platforms

Client service consistency suffers

12 MONTHS
Integration costs continue to mount

OVER 12 MONTHS
The merger may ultimately fail, with firms deciding to "demerge"

Maximizing ROI Through Unified Platforms

Standardization enables the synergies that justify merger premiums:

Staff Utilization

Employees can work across all offices and client bases.

Training Efficiency

One set of best practices and procedures to learn.

Client Experience

Consistent service delivery regardless of location.

Cost Reduction

Consolidated vendor contracts and eliminated redundancies.

The message is clear: Technology standardization isn't optional for achieving post-merger ROI—it's the foundation that makes all other merger benefits possible.

02

Post-Acquisition Tech Conflicts & How to Standardize Your Stack

Typical Pre-Merger Scenario

Before merging, each firm typically operates with its own unique mix of desktop applications, cloud solutions, and legacy systems.

Even a simple merger between two firms can involve reconciling:

- Multiple tax preparation platforms
- Different document management systems
- Incompatible time and billing software
- Various client portal solutions
- Disparate communication platforms

Some firms are running three or more redundant systems.

In a *CPAFMA* survey of 130 firms, 10% maintained duplicate research tools, with five firms operating three or more redundant systems.

Common Conflicts

01

Application Overlap

Research shows firms use hundreds of applications with significant duplication across tax, audit, practice management, CRM, productivity, and workflow categories.

02

Different Hosting Environments

When one firm operates fully in the cloud while another relies on local servers—or uses a hybrid mix—integration complexity multiplies, requiring immediate resolution of incompatible remote access methods and infrastructure.

03

Varied Cybersecurity Maturity Levels

Security gaps between merging firms create critical vulnerabilities through inconsistent password policies, misaligned encryption standards, and incompatible backup procedures that expose both firms to breach risks during integration.

> "Acquiring all these little accounting firms is super difficult to manage. We needed a model where we could add accounting firms quickly, without losing control of our data, our security, or our ability to execute."
>
> BRENDAN WELSH, COO, ARCHER LEWIS

Step-by-Step: How to Standardize Your Tech Stack

Step 1: Assess and Inventory

A successful M&A starts before the ink dries. Conducting a comprehensive IT assessment as part of due diligence can help identify potential issues early.

Conduct a Complete Tech Audit

Key components include:

- **Hardware inventory evaluation:** Identify servers, workstations, and networking equipment to assess upgrade or replacement needs.
- **Software licensing audits:** Document all accounting, tax, and productivity software to uncover overlaps and compliance gaps.
- **Network infrastructure analysis:** Examine connectivity, bandwidth, and security configurations to ensure scalability.

Identify Critical vs. Redundant Tools

Create a comprehensive inventory documenting:

- All devices and software applications, including versions and licensing information
- Data storage solutions, including cloud services, backup procedures, and current cybersecurity strategies
- Compliance with industry regulations and standards

Map Dependencies and Risk Areas

Identify whether the firm's primary production areas are tax, assurance, or advisory, as this will inform IT needs and priorities. Pay special attention to:

- Application compatibility issues
- Data migration requirements and vendor availability for conversions
- Integration points between systems
- Single points of failure

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CHECKLIST —

The FPO Snapshot Inventory worksheet

- [ ] Managing Partner
- [ ] Technology Partner
- [ ] Network Administrator
- [ ] Other IT Staff
- [ ] Training Coordinator
- [ ] Firm Admin

Network Infrastructure

1	Switches/Hubs: Brand	
2	Uninterruptible Power Supply: Brand	
3	Internet Firewall: Brand	
4	Backup Device (Disk/Tape): Brand	
5	Backup Software/Offsite Service:	
6	Antivirus on Server:	
7	Anti-spam/Remailer Management:	
8	Other/Utilities:	

PRO TIP:

Use standardized IT assessment checklists to ensure nothing falls through the cracks. The FPO (Firm Process Optimization) Snapshot Inventory is specifically designed for this purpose.

DOWNLOAD

the FPO Snapshot Inventory worksheet

Step 2: Define the Target Architecture

Determine Your "North Star" Tech Stack Model

Your target architecture should reflect both current needs and future growth plans.

Align with Your Operating Model and Scalability Goals

Key decisions include:

- Cloud-first vs. hybrid approach
- Best-of-breed vs. integrated suite solutions
- Centralized vs. distributed data management
- Remote work enablement requirements

Example Target Architecture

A proven model includes:

One secure hosting environment (cloud-based for scalability)

Standardized accounting/tax software and productivity suite

Unified communication and collaboration tools

Integrated practice management and workflow platform

Centralized security and compliance framework

Learning organization designed to provide training and application support

Step 3: Build a Standardization Framework

Create Governance Standards

Establish clear policies for:

- **Approved tools:** Define the standard technology stack all firms must adopt.
- **Security policies:** Implement enterprise-grade security protocols.
- **Vendor criteria:** Establish requirements for technology partners.
- **Data governance:** Set standards for data management and retention.

Develop a Repeatable M&A IT Checklist

Pre-acquisition
IT due diligence, compatibility assessment, cost estimation

Day 1
Security protocols, access controls, communication setup

30 Days
Data migration, application consolidation, training initiation

90 Days
Full platform adoption, legacy system archival, and retirement

6 Months
Optimization, performance review, lessons learned

Include Compliance Frameworks

Ensure your framework addresses:

- FTC Safeguards Rule requirements
- IRS Security Six protocols
- SOC 2 compliance standards
- Written Information Security Plans (WISPs)
- State-specific regulatory requirements

Click here to access a FREE WISP template.

Step 4: Build Your Integration Roadmap

Aim to complete IT transitions within 6 to 12 months. This timeline enables thorough training and gradual system integration, thereby reducing the likelihood of operational hiccups while maintaining business continuity.

Brand Alignment Considerations

Before or during this phase, determine whether your firm will operate under a branded house (single firm identity) or house of brands (independent firm identities). This decision has major implications for your technology roadmap, particularly around email domain consolidation, directory services, and team collaboration tools. A unified brand typically requires early alignment on communication platforms and naming conventions, while a multi-brand model demands intentional boundaries and access controls to maintain data security and brand autonomy.

PHASE 1
Days 1-30

Security and Access Controls

- Implement unified security protocols
- Establish single sign-on across platforms
- Set up communication and collaboration tools

PHASE 2
Days 31-90

Core Production Systems

- Migrate tax preparation software and data
- Consolidate practice management systems and reconcile
- Unify document management platforms

PHASE 3
Days 91-180

Supporting Systems

- Begin planning for combined client base support platforms
- Standardize reporting tools
- Retire redundant legacy systems

CRITICAL TIMING TIP:

If your merger is close to year-end, book data conversion services early. Vendors get swamped during busy season, and not having a reserved data conversion slot can derail your entire timeline.

Enhanced Reporting and Benchmarking

Beyond basic reporting standardization, use this opportunity to establish a unified data model for firmwide benchmarking. Standardized systems make it possible to compare and improve performance across offices, service lines, or even separately branded firms.

Key metrics to track include:

- Revenue per employee
- Annual recurring revenue (ARR) per client
- Productivity measures (e.g., average time per return, realization rates)
- Client profitability by segment

This type of benchmarking turns integration data into strategic insight, helping leadership pinpoint where technology and process improvements yield the greatest ROI.

Budget for Success

Factor these costs into your integration planning:

- **Savings:** License consolidation and renegotiated vendor contracts
- **Investments:** Data migration, training programs, temporary consultants
- **Hidden costs:** Short-term productivity dips during transition
- **Long-term gains:** Operational efficiencies and reduced IT overhead

Remember:
A well-planned roadmap with realistic timelines and adequate budget prevents the technology chaos that derails many mergers. Invest the time up front to ensure smooth execution.

Step 5: Execute and Monitor

01 Start with a Pilot Program

Begin your integration with one acquired firm to refine your approach before full rollout. Select a tech-savvy, willing partner firm for this pilot phase. Document every step of the process, including challenges encountered and solutions implemented. Gather comprehensive feedback from all stakeholders—partners, staff, and IT teams—then use these insights to refine your processes before expanding to other acquisitions.

02 Establish Key Metrics

Track success with measurable outcomes:

- **Adoption rates:** Percentage of users on new platform
- **Efficiency gains:** Time saved per process
- **Cost savings:** Reduced licensing and maintenance
- **Security incidents:** Reduction in vulnerabilities
- **Client satisfaction:** Service continuity metrics

03 Commit to Continuous Improvement

Technology integration doesn't end at go-live. Schedule monthly reviews during the active integration phase to catch and address issues quickly.

After stabilization, shift to quarterly optimization sessions where you can fine-tune processes based on user feedback. Conduct annual strategic technology assessments to ensure your infrastructure continues to meet evolving business needs.

Create formal channels for ongoing feedback from both users and clients—their insights will drive meaningful improvements and help identify emerging issues before they become problems.

Plan your 1-year monitoring schedule

- ☑ Monthly reviews
- ☑ Quarterly optimization sessions
- ☑ Annual technology assessments with five firms operating three or more redundant systems.

03 Managing the Human Side of Technology Standardization

Understand Why People Resist

Initially, mergers rarely boost morale. People become comfortable with their systems and fear change for valid reasons—they worry about job security, losing their expertise value, or struggling with new learning curves. The firms that succeed with M&A recognize these concerns and optimize their change management approach accordingly.

Communicate the Business Case

Your messaging matters. When explaining technology standardization, focus on benefits that resonate with different stakeholders.

Tell partners how standardized systems enable better client service and position the firm for growth.

Show staff how learning industry-standard tools enhances their career marketability and creates opportunities for advancement.

Emphasize practical benefits like improved work-life balance through more efficient systems and the ability to seamlessly cover for colleagues during busy seasons or vacations.

Most importantly, be transparent about timelines, expectations, and the support you'll provide throughout the transition. Share quick wins early to demonstrate immediate value and build momentum for larger changes.

Here are a few more ways to ensure every member of your team realizes the benefits of joining a larger firm:

Invest in comprehensive training programs

Offer multiple learning formats (videos, guides, hands-on sessions) and create role-specific paths so staff learn all they need for their positions.

Establish technology champions

Identify respected team members from both firms to serve as ambassadors who can share success stories and help colleagues overcome challenges.

Create just-in-time resources

Build searchable knowledge bases and quick reference guides that staff can access exactly when they need help with specific tasks.

Recognize early adopters

Implement certification programs and team-based adoption goals that reward progress while encouraging collaboration across the merged firms.

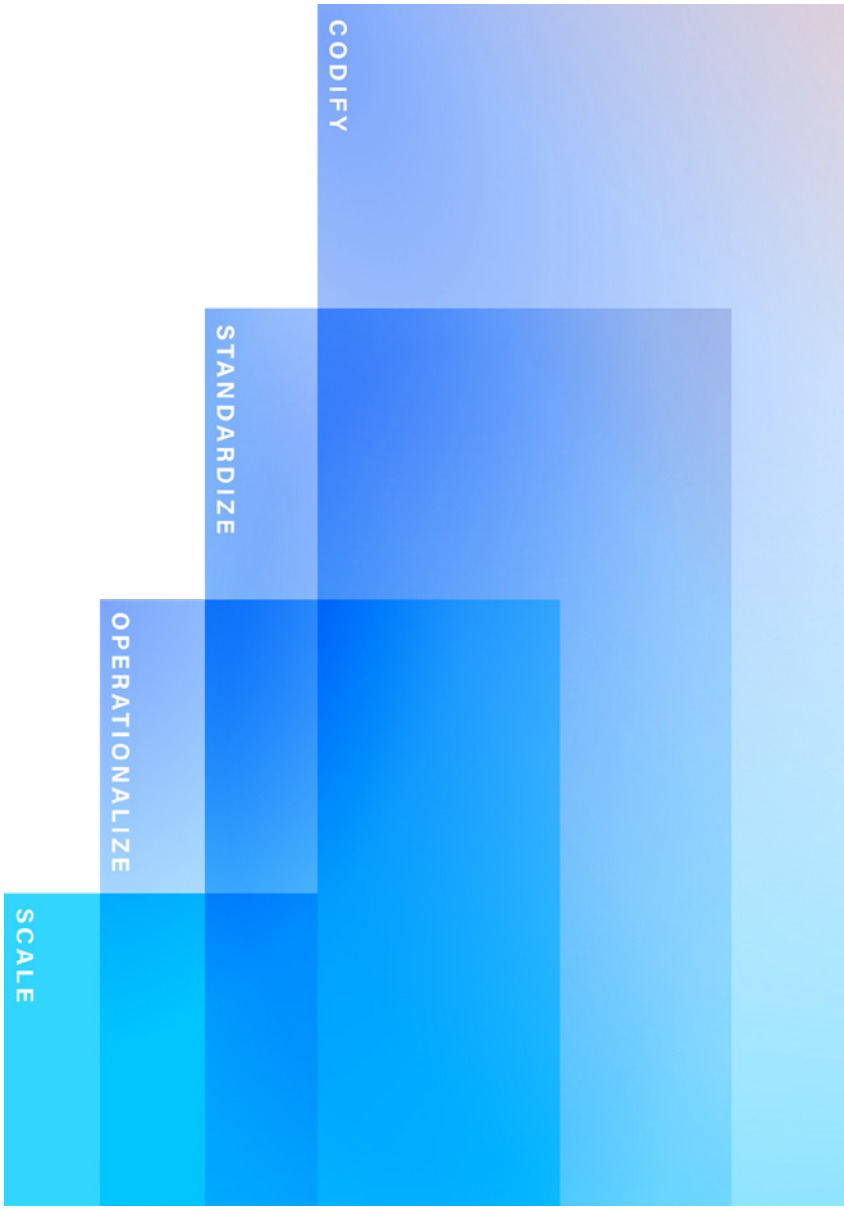
Foster continuous learning

Capture and share best practices as they emerge, using collaboration tools to provide real-time support across all locations.

04

How to Create a Repeatable Framework for Future Acquisitions

Technology integration shouldn't be reinvented with every acquisition. The most successful firms treat it as a strategic discipline—one that gets stronger, faster, and more efficient with each deal. Creating a repeatable framework allows your team to capture lessons learned, minimize disruption, and accelerate time to value.



01 Codify What Works

Document the processes, tools, and timelines that drove success in your initial integrations. Standardize your assessment templates, migration checklists, and training materials so they can be easily reused and refined. Over time, this living framework becomes your internal playbook for future acquisitions—grounded in data and proven results, not assumptions.

02 Establish Firmwide Standards

Consistency is the cornerstone of scale. Define clear enterprise-wide IT and security standards that every newly acquired firm must align to. This includes unified access management, compliance procedures, and regulatory safeguards such as Written Information Security Plans (WISPs). Centralized governance ensures each new entity strengthens, rather than fragments, your overall infrastructure.

03 Operationalize the Playbook

Transform integration into a structured, measurable process. Build a playbook that guides teams through each phase: from pre-acquisition due diligence to 30-day integration milestones and 90-day success metrics. Capture lessons learned after each acquisition to continuously improve efficiency and outcomes. Over time, your firm's integration muscle memory becomes a true competitive differentiator.

04 Treat Technology as a Growth Engine

Technology is no longer a back-office function—it's the foundation of scalable growth. Select platforms that can expand with your acquisition strategy, enabling rapid onboarding, secure collaboration, and consistent performance across all entities. Prioritize flexibility, security, and automation to ensure your systems evolve as fast as your portfolio does.

IN PRACTICE:

When technology is built into your M&A strategy—not bolted on after the fact—each acquisition strengthens your firm's operational core. You move from one-time integrations to a repeatable, data-driven framework that accelerates growth, reduces risk, and positions your firm as a disciplined acquirer ready for long-term success.

05 Conclusion

Technology standardization is the engine that powers successful M&A outcomes.

Firms that invest early in IT integration achieve the promised synergies, protect client trust, and create the foundation for scalable, repeatable growth. Begin with a thorough tech audit, build a 6- to 12-month integration roadmap, and partner with experts who can unify your environment. In today's market, the firms that master technology standardization won't just survive consolidation—they'll lead it.

Infrastructure built for expansion and long-term performance

For more ways to gain efficiency, control, and security firm-wide, visit **https://www.rightworks.com/growthandscale/**