the buyers guide to workflow software for accountants

Let's break it down:

	EASE OF SETUP	DAY-TO-DAY	FEATURES	CUSTOMER SERVICE	PRICE/ COST	INTEGRATIONS	REVIEWS	OVERALL RATING
JETPACK WORKFLOW	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
XCM TOOLS (AKA XCMSCHEDULER)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
THOMSON REUTERS PRACTICE CS (AKA CS PROFESSIONAL SUITE)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
AERO WORKFLOW	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
KARBONHQ	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CANOPY TAX WORKFLOW	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
FINANCIAL CENTS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CCH iFirm	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLICKUP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
MONDAY	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
ASANA	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Jetpack Workflow

the buyers guide
to workflow software for accountants

If you're reading this, you've decided (or are considering) implementing a workflow software tool in your accounting firm. You figure it's time to move from the Word docs, handwritten notes, and email strings to a software solution. A centralized hub for all of your accounting firm's processes to live.

A platform that puts the "flow" in your workflow by:

- Listing, assigning, and monitoring tasks
- Staying on top of client projects to ensure timeliness and quality control
- Better understanding and managing capacity

Now, it's a matter of figuring out exactly what you need in a workflow tool — and how to choose the right one for your practice. So let's get to it!

questions to ask yourself and your team

First things first, there are a few questions to ask yourself (and your team). Questions about services offered, current processes, growth prospects, and things you hope to gain by using a workflow software.

Note: These aren't questions for the tools you're thinking about using, this exercise is for your firm. Understanding how things are and what you hope to achieve is key to choosing the right solution — no matter what you're looking for.

Nietzsche said,
"One has to know the size of one's stomach."

Why it's a useful exercise: By better knowing what you want, it's easier to pair that with functions of the tools you'll look at. For example, if the team is missing deadlines, the task management system of your workflow software is vital.

The big question to consider: What specific benefits do we hope to gain?

List out your expectations, or what you hope to gain from software. After all, if you're thinking about getting a workflow software, it's because you hope it'll improve the way you work, right?

Here are three sub-questions to pull those expectations to the forefront.

1. Where are our biggest opportunities, as a firm?

A little introspection never hurt anyone. And having a keen eye for strengths and not-so-strong aspects of your business is the only way to move toward improvement.

As a firm, we hear many accountants say things like:

- "We're growing, but things are beginning to slip through the cracks or go missing."
- "The more clients we serve, communication is more difficult."
- "Some members of the team do things differently than others and our deliverables aren't consistent."

KEY POINT: Dig deep to find the reason you went on the hunt for a workflow tool. Do this and you'll quickly see which tech solutions aren't a great fit for your firm.

2. Am I (as the owner) a bottleneck, and if so, why?

"It's just faster if I do it."
Have you ever said that? (And don't lie!)

Documented processes create the ability to delegate. How you want each service, task, and project handled in a universal hub, for the entire team to see. Inversely, lack of clear process leads to one person (namely you) having to quality check e-v-e-r-y-t-h-i-n-g.

EXAMPLE:

You handle the lion's share (or a disproportionate amount) of client communication.

Why? Because there are so many variables and things that could go wrong.

- Some finance professionals are introverts. What if they say something short and offend the client?
- What if the client asks a question and your team answers it without knowing how you'd like it answered?
- No one else will advance the relationship, leading to more opportunities from clients like you do.

And really, this is only a single way you can be the bottleneck.
Here's how to list these things out:

1. Make a list of everything you do that you likely shouldn't (or things you do too much of/too often)
2. Really figure out why (don't just say it's faster)
3. Begin to think about the processes that will remove these heavy items from your plate

3. Where is the firm headed?

Workflow tools help improve accounting firms by reducing mistakes. But they also help prepare businesses for their future. The first couple questions highlighted potential negatives. This one is all about where you see things in the future.

Be pragmatic and specific.

- Within the next 1-3 years, no one will work more than 40 hours during tax season.
- XX% of our revenue comes from [insert service(s)] here by 20XX.
- Focus on this specific industry and serve XX of those clients in 18 months.

Goals are where it starts. Then comes the plan. From there, it's down to specific strategies and projects. Finally, those things are subdivided into individual tasks to complete.

With all of this in hand, you'll be able to see which workflow tool improves your current firm while also helping you achieve the goals you're working towards.

Criteria to Evaluate in a Workflow Software

With a good snapshot of your firm (and its future) in hand,
it's time to look at the features, qualities, and reputation workflow platforms offer.

EASE OF SET UP

Implementing any new software is a challenge. And one that your entire team utilizes is all the more challenging. The fancy tech word is "intuitive." Basically, it means that the developers thought through how users (that's you and your team) will use the software.

The better they did their job, the easier it'll be for you to implement and use the tool in your business.

Things that aid setup include:

- Demonstrations, tutorials, and guides
- In-app prompts and an easy to understand interface (how things are setup)
- Great customer support (another item on our list, further down)
- Additional services (like guided help or even "done-for-you" setup)

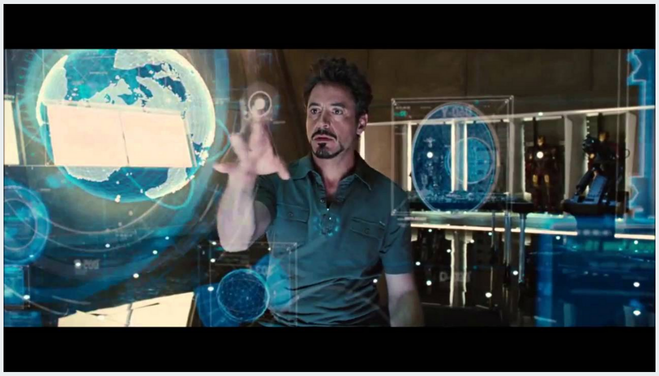
DAY TO DAY MANAGEMENT

This goes back to the buzzword "intuitive." Let's say you sign up for a trial, which you should (most workflow software offer them). You set things up and really attempt to use it on a small scale.

After a few days, do you feel like logging back into it?

When used correctly, owners don't feel like their workflow tool is a chore. It feels more like a dashboard that helps you make better decisions. You think Tony Stark would have all of those cool digital displays if they weren't important?

Maybe, but you get the idea. You should feel in control, not behind the eight ball.



KEY POINT The right tool will help you run your business, not be a hassle to keep up-to-date.

THE LITERAL FUNCTIONALITY OF THE TOOL (AKA THE "FEATURES")

All software does something. These things are called features. Workflow tools have a number of features, all related to helping service-based businesses (in this case accounting firms) get their work done.

Common features of a workflow tool:

- Task management
- Progress reporting
- Client management
- Common integrations (i.e. Zapier, Quickbooks Online, etc.)
- Cloud-based, real-time project tracking

Not-so-common and accounting-specific features:

- Pre-made accounting templates (for things like client onboarding, specific services, and anything else most firms do)
- Capacity planning (a live look at who's doing what, why it's not done, and the ability to quickly move things around to make sure everything runs smoothly)

CUSTOMER SERVICE

Moving all of your processes, or creating them for the first time, into a software is a great feeling. And over time, it becomes an indispensable aspect of the way your business works.

It's great! That said, issues will likely arise.

Whether it's during onboarding/implementation, adding new teammates, or not understanding a feature — good customer service is vital.

Here are three critical areas of support:

- Helpful Resources: Not to contradict our earlier point, but sometimes it's good to figure out things yourself. A quality, searchable knowledge base (KB) allows you to find all of the bells and whistles your software solution provides. A good KB includes articles, or even videos, showing every button and facet of the product.
- Fast Response Time: Test the company by starting a chat or sending an email. You'll want to test not only the response time but also ask a question about the product to get a sense of quality and helpfulness as well. Ultimately, you'll want to test their responsiveness, product knowledge, and demeanor.
- Multiple Methods of Contact: Is it an email issue or a "get on the phone now" kinda problem? Live chat, email, and phone support are the trifecta to look for, and why shouldn't they have those available? After all, it's the hub for everything you do!

PRICE (AND COST)

This one's tricky. Because price is the amount of money you pay each month. Cost, in this estimation, is the amount you get for that monthly fee. Some tools have a low price tag, but have certain limitations on the actual product you receive.
A few things to look for include:

- Users: Maybe the tool in question only allows up to 3 users, requiring an extra monthly charge for each additional admin or even accountant on your payroll.
- Bandwidth/Resources: Does the workflow tool limit the number of clients in the system, in certain pricing tiers? Documents you can accept/create? Are there limitations on common uses, at all?
- Extras: Some companies charge extra for the number of resources/people you have. Others charge more for the goodies. (For example, maybe they have templates, but it's not a part of their lowest-tier plan.)

Bottomline? Look at what you get for the price — features, users, resources, goodies — not simply the dollar amount.

INTEGRATIONS

Can anyone get anything done without three apps running, at the same time? Not really. Accountants haven't been app free since Quickbooks opened their doors in 1983 (probably an exaggeration).

But you know what makes it easier? When all of those apps work together, seamlessly. That's where "integrations" come onto the scene.

Before you go workflow software shopping, make a list of all of the other tools you use.

- Communication tTools (Gmail, Slack)
- Accounting Tools (QB, Xero, Jirav, Expensify)
- Client Tools (Jotform, Calendly)
- Sales Tools (CRMs, email marketing)

Ideally, all your tools work seamlessly together. In reality, this is rarely the case. This is why having an integration with "Zapier", a tool that lets you connect with 3,000+ applications, is a great option to make sure your client database stays in sync.

Essentially, you want your workflow tool to work with all the tools in your workflow.

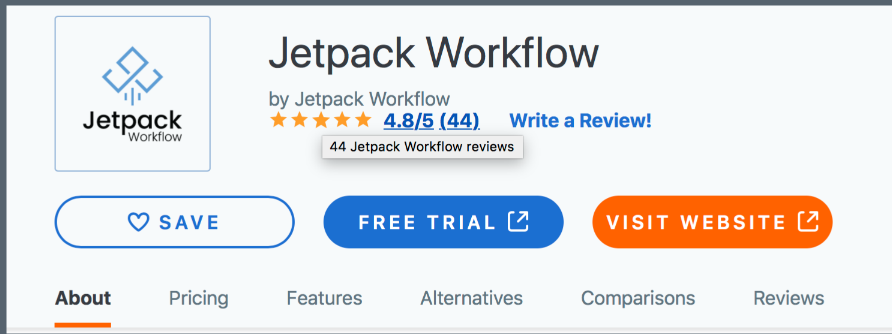
10 COMPETITORS + JETPACK WORKFLOW

Ok, now we'll give you a brief introduction and a few of the main features for 10 potential workflow software solutions. Hopefully, you'll use this to begin your search for the best tool for your accounting firm.

Note:

The rating system we use is a 1-5, one being least impressed and five being best in class. In addition to an "overall rating," we give an explanation as well as a 1-5 rating for applicable criteria mentioned above.

Here we go!



JETPACK WORKFLOW

Overall rating: 4.7/5

Jetpack Workflow wants to be the hub of your accounting firm. Our platform isn't just for accounting firms, but firm owners like you. At the end of the day, you want your business to run smoothly, clients to be happy, and to have the time to do things outside of the office. (Without feeling guilty and overwhelmed!)

How do we here at Jetpack fare against the serious seven criteria?

Ease of setup: 5/5

Here at Jetpack, we offer regular webinars and training sessions, a knowledge base, and a support crew for those who want to set things up themselves. For others who want assistance, we offer personalized setup training and a complete "done for you" service.

Day-to-day: 5/5

After you use our accounting-specific templates to document each service and process in your firm, it'll be hard not to keep coming back. Plus, our reporting shows you exactly where your team is at and helps you to ensure nothing slips through the cracks.

Features: 4/5

Jetpack Workflow's features make sure to keep all of your firm's processes in a single place, but it also helps owners with:

- Pre-made templates: Templates specific to the processes and services offered by accountants, too.
- Capacity planning tools: Capacity planning makes it easy to see and better allocate your team and resources, in real-time.
- Detailed reporting: See how your team is doing, in the moment, so you can know everything is moving along exactly as it should.

Customer service: 5/5

We have phone, email, and chat support. You can also get a hold of our support team directly in the app, where you may be experiencing an issue.

- Helpful Resources: There are more than 30 templates for the processes you likely already do (all accounting specific). And there's a 14-day free trial so you can get acquainted with our platform.
- Fast Response Time: We like to think so.
- Multiple Methods of Contact: Hit us up on the phone, via chat, or in the inbox.

Price/cost: 5/5

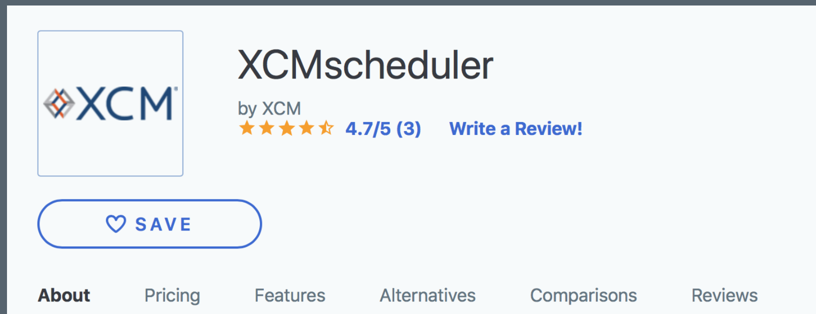
There are two unlimited tiers. Both have all of the same workflow features. The "Scale" plan includes our new capacity management and scheduling features to help you run all aspects of your firm.

Integrations: 4/5

Jetpack features integrations, including those on Zapier, to connect all of the tools you currently use in your business.

Reviews: 4.8/5

We love hearing from our customers! In fact, we collect them on the site.



XCM TOOLS (AKA XCMSCHEDULER)

Overall rating: 3.1/5

XCMworkflow is a cloud-based system that aims to help accountants and finance professionals be more productive through process and technology.

XCM is commonly a better fit for large or "enterprise" level firms. Often, small to medium size firms cannot afford it (either too expensive or the implementation is too costly or time consuming).

Now, let's see how XCM stacks up to our 7 research criteria.

Ease of Setup: 3/5

XCM offers a migration service for guided setup. For DIYers, there are hundreds of videos, a knowledge base, and a forum-like community to ask other users any question you have.

Day-to-day: 2/5

According to the reviews we read, the software makes moving projects easy, but some users want more customization. Given that, the day-to-day use may not be as enjoyable as some products on the list.

Features: 3/5

- Resource allocation: XCM gives users the ability to see who's doing what, and where handoffs happen, to create smoother handoffs by better allocating your team.
- Project tracking: You can see where individual projects and client work stand, to get a better understanding of progress and remain on track.
- Process management: XCM has a suite of different products. One of which allows firm owners to document all processes within their firm.

Customer service: 3/5

In addition to the large video database and knowledge base, a chat is available on the support page. After some digging and clicking through, we were able to find certain numbers to get a hold of someone at the company.

- Helpful Resources: Knowledge base, youtube videos
- Fast Response Time: Not publicly listed
- Multiple Methods of Contact: Only an email was listed on their site (hello@xcmworkflow.coM)

Price/Cost: N/A

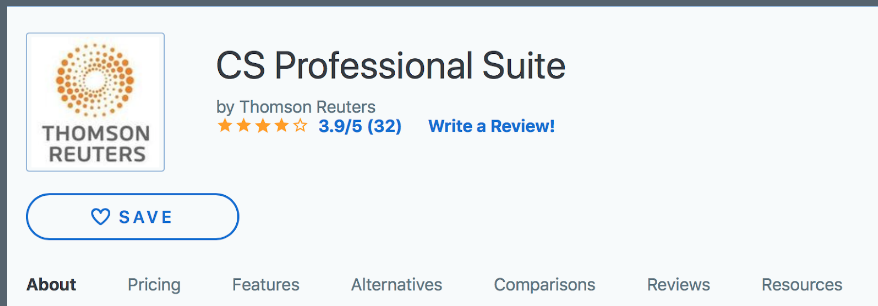
We searched, but XCMscheduler doesn't have a publicly available price, which makes it difficult to determine the value.

Integrations: N/A

After a search on their site, we weren't able to find anything regarding integrations. Even took a look at Zapier and didn't seem to find anything there, either.

Reviews: 4.7/5

There are only three reviews on Capterra (the software review site we used for this comparison). Not a lot to go on, but there are written reviews to go along with the star rating.



THOMSON REUTERS PRACTICE CS
(AKA CS PROFESSIONAL SUITE)

Overall rating: 2.8/5

Thomson Reuters wants to give accountants the ability to spend a little more time away from the desk. Practice CS helps to streamline administration tasks and free up employee hours so you have less "administrative" work to do on top of managing your clients, payroll, and compliance requirements.

Primarily a billing and time tool, Practice CS also has accounting project management capabilities that allows the ability to set and see deadlines.

How does Thomson Reuters hold up to our 7 research criteria?

Ease of Setup: 1/5

Thomson Reuters has a number of products and while they do have a “Help & How-To Center” it’s for everything they offer. The design is a bit old and clunky (reminds us of navigating around a website’s cPanel, if you know what that looks like). To be completely honest, there’s a lot going on just on the site. It’s hard to tell what they want you to do.

Day-to-day: 2/5

A seemingly common issue amongst the reviews was the speed of the software. Overall “ease of use” rating was also a bit low, at 3.7 out of five, for those who reviewed.

Features: 3/5

- Built-in time and billing tools: Not only can you track time, but CS has a feature to directly bill clients.
- Project reporting: Visual reports often help us move faster to solve problems. Seeing your progress, via project reporting helps potential issues pop out.
- Customizable dashboards: There are some widgets you simply don’t use. A customization feature is available in Reuters software.

Customer service: 4/5

There is a phone number (with listed support hours), chat support, and a contact form—all accessible in short order.

- Helpful Resources: Resources are pretty sparse. Some events, but not much in the way of useful content.
- Fast Response Time: Pretty responsive chatbot
- Multiple Methods of Contact: Chat, support numbers and clearly listed hours of availability

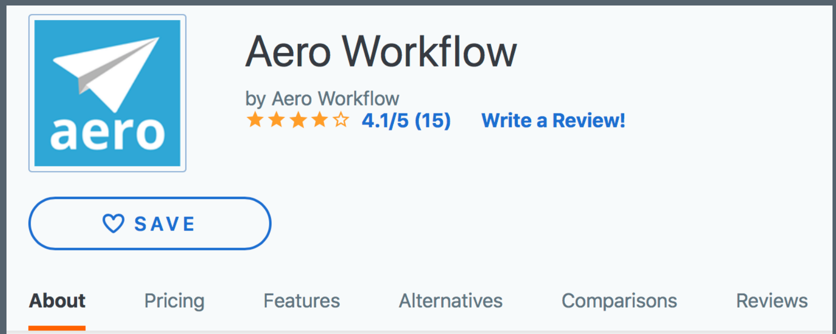
Price/Cost: N/A

CS Professional Suite doesn’t give any information regarding price, either.

Integrations: N/A

With so many “in-house” products, it seems like Reuters doesn’t integrate with many (if any) other tools.

Reviews: 3.9/5



AERO WORKFLOW

Overall rating: 2.9/5

Aero tries to be more than just a to-do list for your firm. One clear view of all the client work that needs attention for the day. It also seems to be geared towards simplicity.

Let's see how Aero Workflow compares with the 7 research criteria.

Ease of Setup: 3/5

There are webinars, demo videos, and a knowledge base, so DIY setup seems pretty straightforward. For those who don't have the time or want someone else to handle it, Aero does offer a "White Glove Onboarding" service, ranging from $1000-$2000.

Day-to-day: 2/5

Lots of reviews listing the clunkiness of the interface. Overall "ease of use" on Capterra is a 3.4. (Pretty rough seeing as how the overall rank is a 4.1.)

Features: 3/5

- Time and project tracking: Some firms don't bill by the hour, but nearly every accounting practice tracks hours. There is a feature in Aero that keeps time.
- Schedule one-time and recurring tasks: Accounting has a lot of repeat tasks and the ability to set recurring tasks is vital.
- Create and store processes: A good workflow tool creates a training manual-esque hub for your business.

Customer service: 2/5

Aero has a lot of content and additional services to help you along the way. Although, some reviews hint at some sub-par service.

- Helpful Resources: Tons of webinars, a knowledge base, and even "white glove" help, if needed.
- Fast Response Time: Not readily available, Aero wanted to point us to content before connecting with a real person.
- Multiple Methods of Contact: Live chat is available, during business hours. But no phone number or email readily available.

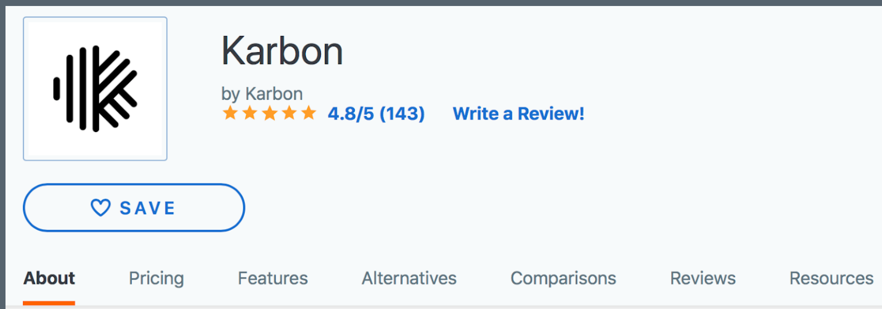
Price/Cost: 3/5

Pricing and value aren't bad, with Aero. They do limit users (anywhere from 1-25), but seems like all integrations and limitless clients are included in every plan.

Integrations: 3/5

There are four direct integrations, listed on the site. And Aero is connected to Zapier, with dozens of readily available connections.

Reviews: 4.1/5



KARBONHQ

Overall rating: 3.5/5

KarbonHQ attempts to add your clients as an active part of the workflow process, even to the point of giving tasks to accounting customers. The focus is on “automation,” for accountants to think less about individual tasks each day/month/quarter and focus on the deliverables.

What does KarbonHQ have to offer?

Ease of Setup: 2/5

While KarbonHQ has a great interface, the typical course of setup seems to be paying for one of their many service options. Because it seems directed towards services instead of self setup, this was scored much lower.

Day-to-day: 3/5

Karbon has a lot going on, which can be good. However, calendar and email integrations have some issues. And several reviewers found the task list to be overwhelming, which is huge in the accounting space.

Features: 4/5

- Automatic client data collection: There are a lot of steps to new client intake. Karbon automatically collects data, when possible.
- Recurring task generation: This is a common feature, but an important one for accountants with regular monthly/quarterly/annual tasks.
- Document storage: Reports, spreadsheets, and docs in the same place as your workflow processes.

Customer service: 4/5

It looks like Karbon wants all support inquiries to move through their chat. To be fair, we clicked on the support chat and were impressed with the speed at which we were talking with someone.

- Helpful Resources: Karbon has expansive resources for their product and for accounting firms, in general.
- Fast Response Time: The chat said “20 minutes” when we went there.
- Multiple Methods of Contact: Mainly chat, but to be fair, that chat widget immediately pops up on the site and displays the average response time.

Price/Cost: 2/5

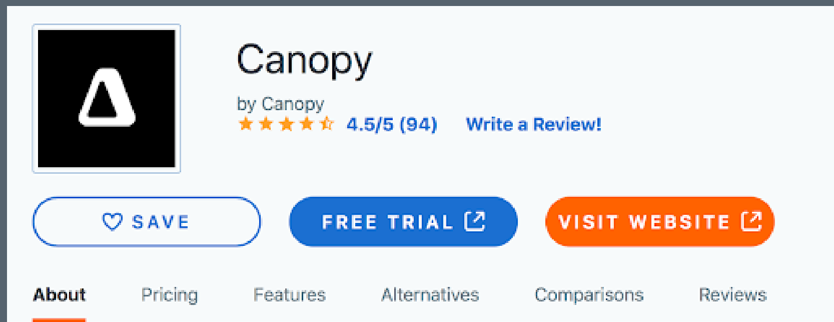
Karbon charges per user, based on a few different tiers. This means for every teammate, you’ll pay a certain amount (either $49 or $69/mo on the plans listed). The price difference comes with the features. For example, you only get integrations and task automation in the $69/mo plan. For firms with more than a few accountants, that can add up quickly.

Integrations: 5/5

There are 10 direct integrations and a decent amount of “Zaps” in Zapier.

Reviews: 4.8/5

Karbon is well-reviewed, both in the number of them and the average rating. The downside seems to be the features/pricing conundrum.



CANOPY TAX WORKFLOW

Overall rating: 2.6/5

Canopy labels itself as a “practice management software” for accounting firms. The feature set includes the typical project management and document tools, but also includes things like a CRM and some communication capabilities. Their strength is in time and billing with client portals. Customer support, workflow, and task management seem to be on the weaker end.
Now, let’s take a closer look at Canopy.

Ease of Setup: 4/5

Canopy creates an easy migration environment, with detailed explanations to transfer files from a number of different accounting programs. In addition to this, they also have a migration team ready to help any firm implementing their tools. There is also a knowledge base and set of tutorials for users.

Day-to-day: 3/5

The day-to-day ease of use seems to be one of the benefits of Canopy, with users giving it a 4.5/5. That said, one complaint from many reviewers is that the tasks feature seems a bit clunky. Because the task feature is so foundational but received poor reviews, the highest score was a 3.

Features: 3/5

- Built-in CRM: Customer relationship management deals with both new leads and current customers. Combining the marketing/sales with workflow makes a built-in CRM unique.
- Integrated time and billing within the system.
- Client portal: Give your clients a login and set what they see. Handle deliverables and better manage communication in the app.

Customer service: 2/5

One of the easiest support numbers to find, directly in their top menu. Although, it seems there is no chat option or support email.

- Helpful Resources: A nice amount of video tutorials (not too much or too little), a KB, and a page for product updates to help users take advantage of new features.
- Fast Response Time: There’s a chatbot, with useful information immediately and a phone number at the top
- Multiple Methods of Contact: Chat and phone number are prominent, but no quick email address.

Price/Cost: 1/5

Canopy offers unlimited users on all plans. However, their pricing is based on “contacts” or clients and leads in your pipeline and features. (It’s kind of like an email marketing platform’s pricing model.)

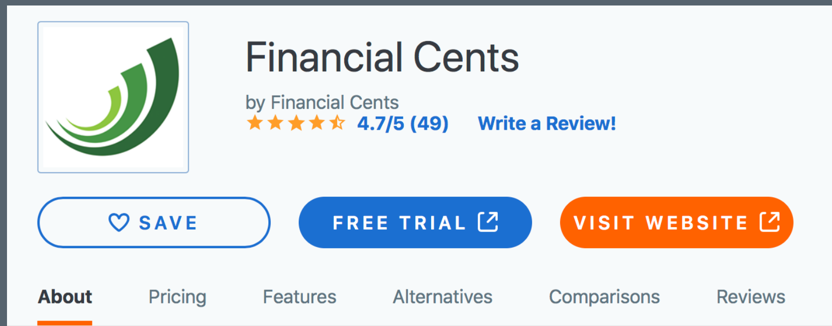
For example, if you have 100 clients and 200 leads, the plans are $134 (standard plan) and $168 (professional). It seems like the features in the professional plan are “advanced” versions of features available in the standard plan. There is also an implementation fee for new users.

Integrations: 1/5

Canopy is on Zapier (currently in Beta) and that is where you handle all integrations (no direct integrations at this time).

Reviews: 4.5/5

Canopy has a mixed bag of reviews. Customer service seems to be an issue in several negative reviews. Although, there are a spackling of comments that say the service is great.



FINANCIAL CENTS

Overall rating: 3.1/5

Financial Cents is another tool that specifically helps accounting firms manage their processes and workload. The focus here is to monitor projects to ensure your team isn't overloaded, or underperforming. They also include invoicing tools to keep one more element of your business in a single tool.

Does Financial Cents make sense in your firm? Let's check the criteria.

Ease of Setup: 2/5

If you buy a Financial Cents plan, "onboarding & training" is included in the price. There is also a knowledge base, but not much (that we saw) in terms of demos/webinars/video content.

Day-to-day: 4/5

They take a simple approach to features which helps with day-to-day usage. The day-to-day limitations seem to come down to features, with a lack of integrations and report generation capabilities.

Features: 3/5

- Workflow management: More than tasks and templates, a real workflow tool allows you to map out each service and process within your firm.
- Invoicing and time tracking: Another tool integrating billing and time tracking.
- Client management: A few features to help you manage clients. Major items missing seems to be around reporting and integrations.

Customer service: 3/5

While there is a physical map on their "contact us" page, it doesn't include a support number. There are video resources, but it takes you to their YouTube channel.

- Helpful Resources: Yes, but you have to do some digging. Their YT channel isn't only tutorials, but other content.
- Fast Response Time: There is an automated message from service personnel as soon as you hop on the website.
- Multiple Methods of Contact: There is a chat on the site as well as an email address.
- Support seems to be limited to only the owner of the business, which creates a varied customer experience.

Price/Cost: 4/5

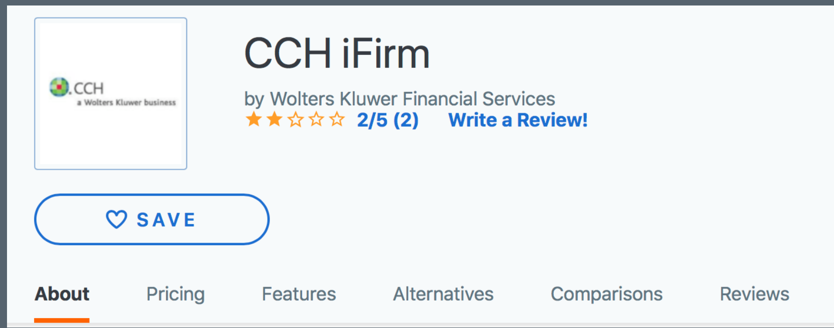
This is another per user pricing model, but only one plan (available for a monthly or annual fee). However, the plans do include unlimited clients, QBO integration, and free onboarding/training.

Integrations: 1/5

We couldn't find any integrations, including on Zapier.

Reviews: 4.7/5

The lack of integration options pull the overall reviews down, but the ease of use score is (again) one of the best.



CCH iFirm

Overall rating: 1.5/5

iFirm is one of the many products offered by Wolters Kluwer. Essentially, it's a client portal to manage, invoice, and track client relationships. The company also offers Accounting Firm Management & Workflow, but few details are available on the product webpage.

Now, let's see how CCH iFirm stacks up.

Ease of Setup: 1/5

Setup seems rough here. There are training materials, but they all seem to be scheduled events that you have to register and show up for to get the information.

Day-to-day: N/A

With so little information about the product, it seems a bit difficult to explain what the day-to-day looks like in CCH.

Features: 2/5

- Client portal*
- Practice management*
- Setup and support*

These things aren't necessarily in all of the plans, and the setup is an additional, one-time fee.

Customer service: 1/5

The "contact us" page is a list of about 1000 terms related to their product/solutions. Scroll down and there is a list of dozens (maybe hundreds?) of individual offices. And after a ton of scrolling, there is a spot to leave your information. No phone number or chat (that we saw)

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- Helpful Resources: The resources just take you to landing pages for each product/service.
- Fast Response Time: Not as fast as any of the others.
- Multiple Methods of Contact: Just a contact form to leave your information.

Price/Cost: N/A

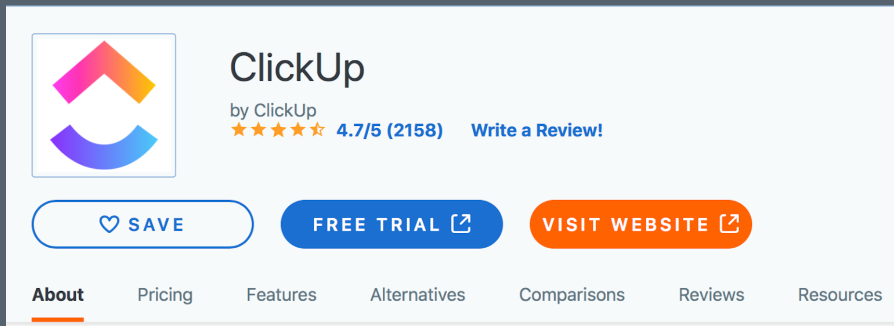
There is no public pricing for CCH iFirm.

Integrations: N/A

There don't seem to be any integrations either.

Reviews: 2/5*

*Not a lot of public reviews. Definitely take it with a grain of salt, but it's worth considering if this is CCHs bread and butter, or a side offering for their company.



CLICKUP

Overall rating: 3.2/5

Clickup isn't specific to accounting, but still has a lot of similarities to those tools that cater specifically to finance folks. But with its "all-in-one and everyone" appeal, it's something you'll want to consider.

Does Clickup meet your firm's needs?

Ease of Setup: 2/5

Clickup is a general workflow/PM/task tool, meaning it's going to require a bit more umph to tailor it for an accounting firm. That said, they have one of the most built out content libraries on our list.

Day-to-day: 3/5

ClickUp requires a lot of heavy lifting to setup your account. This makes day-to-day usage "OK" if you are committed to not making sizeable updates to how you constructed your account.

Features: 4/5

- Marketing features: One advantage of a tool that's not accounting specific are broader features, like marketing tools to help you get the word out about your practice.
- Multiple PM methodologies (e.g. Agile): More for software development, but there are multiple methods for running projects available.
- "Workload chart": It's a bit like a capacity planning tool, highly customizable, but not directly tailored to finance.

Customer service: 3/5

There is a chat on certain pages and a "help@" email address. Clickup also offers consultants, experts at setup, and use. You can get in contact with them pretty easily, but they do charge by the hour.

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- Helpful Resources: Loads of useful content and videos, for DIYers. Consultants for more help and a dedicated onboarding section.
- Fast Response Time: The chat was difficult to find and we didn't test the email address.
- Multiple Methods of Contact: Limited chat and email.

Price/Cost: 3/5

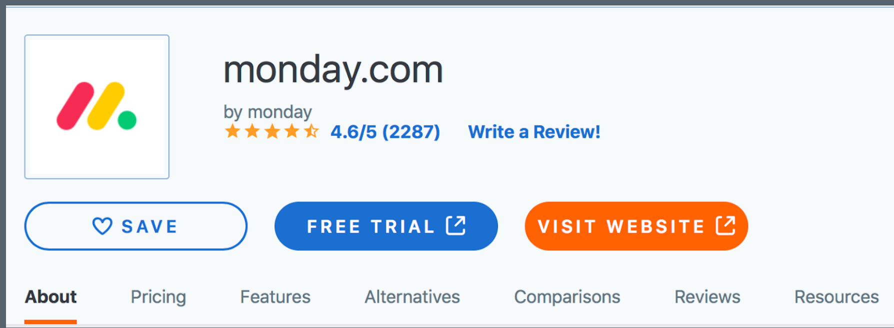
Three plan prices are available; free, unlimited, and business (there is also an unpriced "enterprise" plan). The tiers differentiate which features you have access to and the fees are on a per user, monthly basis.

Integrations: 3/5

There are a ton of direct integrations as well as Zapier connections. Be careful; some of the integrations fit in with accounting firms, but most really don't apply.

Reviews: 4.7/5

Like a tool with low reviews, take the large number with a grain of salt. Most aren't accounting firm users. (Tip: Click into the actual reviews and use the search function on your computer. Type "Account" to see which users work in your industry.)



MONDAY

Overall rating: 3.2/5

Monday.com: surely you've seen the commercials. There's a lot going on here, with all of the features, use cases, and even an "app marketplace" for individual developers to make even more things you can do. That said, this is another tool that can be your accounting workflow hub, but it's not necessarily marketed to that end.

This is how Monday.com makes us feel (based on the 7 criteria).

Ease of Setup: 2/5

A lot going on for a software product means (often, not always) a comprehensive setup. It can (again, not always) also mean the onboarding team may not understand your specific needs.

Day-to-day: 3/5

High customization often correlates with high usability. If you can manage the hurdle of tailoring Monday to the needs of your team and clients, it's likely you'll use it regularly.

Features: 2/5

- Incredible customization: There are third-party consultants that earn money helping businesses take advantage of the customization of Monday's product.
- More than 200 use cases: Again, you only need it for one, but there could be some crossover (e.g. with your marketing efforts).
- While Monday.com boosts an impressive list of features, they are missing a fundamental one for accounting firms...client profiles.

Customer service: 2/5

Detailed knowledge base and training library, a contact form is easily available on the support page.
No phone number or chat, though.

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- Helpful Resources: Infinite uses with a massive amount of resources.
- Fast Response Time: Not readily available
- Multiple Methods of Contact: Nope. You have to click through to the support page and leave contact information.
- While Monday has an impressive library, they do not have an optionfor a 1-1 demo or walkthough.

Price/Cost: 4/5

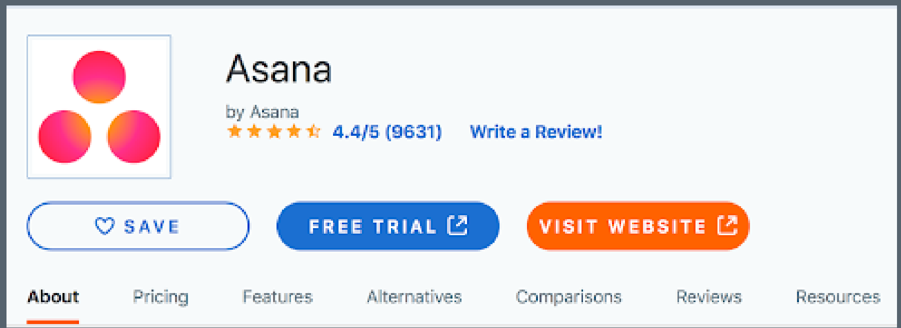
There are five plans, separated by the features you get. All tiers are charged a monthly fee "per seat" (aka user). Interestingly, no automations are available until the $10/mo plan and that only includes 250 automations.

Integrations: 5/5

There are just a lot of integrations. Like, a lot.

Reviews: 4.6/5

Very similar to Clickup. People (in general) seem happy, but try to search the individual reviews for accounting folk.



ASANA

Overall rating: 3.1/5

Another versatile, yet not specific to accounting, workflow tool. Asana is well-known for its project management and task features. People who use it, love it. They'll talk about it, like Keto or Crossfit. But it can be difficult to tailor to the purposes of an accounting firm.

Asana is deep, but does it fair well on the criteria?

Ease of Setup: 2/5

Don't really need to beat the setup drum again. Asana is an "all purpose" workflow/PM/task tool, so it will take some time to get it right. The good thing is, Asana is a humongous company with crazy amounts of resources and people (some for a fee) to help you along.

Day-to-day: 3/5

Asana is actually so powerful, some users find it difficult to use. It's "ease of use" score, on Capterra, comes in lower than the rating at large.

Features: 4/5

- Strong project management/task tool: Asana is all business when it comes to tasks and processes.
- Highly customizable: Much like Monday, in this regard.
- Lots of integrations: Asana is a preferred tool of software developers, which means a lot of apps directly connect to them.

Customer service: 1/5

Support options are a bit disappointing. There's a ton of self-help content, but after some serious clicking (both in and out of the app) we couldn't even find a chat.

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- Helpful Resources: Great amount of resources, which is expected since it's a bit of a climb to get the way you want.
- Fast Response Time: Not readily available
- Multiple Methods of Contact: Not readily available

Price/Cost: 2/5

If you want some custom automations, specific to accounting, that tier is about $25/mo per user.

Integrations: 5/5

Monday had a lot. But Asana...

Reviews: 4.4/5

Asana is one of the lowest, in terms of average reviews for a product of its kind (remember, it's either a love/hate thing). Again, search for those who do what you do, they'll be the best barometer.

Let's break it down:

	EASE OF SETUP	DAY-TO -DAY	FEATURES	CUSTOMER SERVICE	PRICE/ COST	INTEGRATIONS	REVIEWS	OVERALL RATING
JETPACK WORKFLOW	5/5	5/5	4/5	5/5	5/5	4/5	4.8/5	4.7/5
XCM TOOLS (AKA XCMSCHEDULER)	3/5	2/5	3/5	3/5	N/A	N/A	4.7/5	3.1/5
THOMSON REUTERS PRACTICE CS (AKA CS PROFESSIONAL SUITE)	1/5	2/5	3/5	4/5	N/A	N/A	3.9/5	2.8/5
AERO WORKFLOW	3/5	2/5	3/5	2/5	3/5	3/5	4.1/5	2.9/5
KARBONHQ	2/5	3/5	4/5	4/5	2/5	5/5	4.8/5	3.5/5
CANOPY TAX WORKFLOW	4/5	3/5	3/5	2/5	1/5	1/5	4.5/5	2.6/5
FINANCIAL CENTS	2/5	4/5	3/5	3/5	4/5	1/5	4.7/5	3.1/5
CCH iFirm	1/5	N/A	2/5	1/5	N/A	N/A	2/5	1.5/5
CLICKUP	2/5	3/5	4/5	3/5	3/5	3/5	4.7/5	3.2/5
MONDAY	2/5	3/5	2/5	2/5	4/5	5/5	4.6/5	3.2/5
ASANA	2/5	3/5	4/5	1/5	2/5	5/5	4.4/5	3.1/5

Now, It's Your Turn

Hopefully, this resource gives you everything you need to determine what your firm needs, how to list those needs out, and find a software solution that best fits. We even wanted to go a bit further to come up with a comprehensive list of 11 different companies you may consider!

Good luck on your search, and if you're interested...

Give Jetpack Workflow a Try

We strive to meet all of the criteria provided in this buying guide. If you're ready to see if we're the right fit in your firm, try Jetpack Workflow for free for 14 days. You can improve your processes and your business so you can have more time in life you enjoy more than work.

app.jetpackworkflow.com/users/sign_up