CANOPY IMPLEMENTATION SERVICES

Turn Canopy into your firm's operating system

Liz Scott
TRAINING & CONSULTING

Canopy Partner

BUILT FOR FIRMS THAT

- Are implementing Canopy for the first time
- Have Canopy but use workflows inconsistently
- Run multiple offices with different processes
- Are growing and need standardization
- Want reliable reporting across all offices
- Are preparing for scalable growth

AFTER IMPLEMENTATION

- Standardized workflows across every office
- Consistent client experience firm-wide
- Clear staff roles & responsibilites
- Reliable production & profitability reporting
- Scalable onboarding for future growth

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Canopy is scalable operating system — but its success depends entirely on how it's implemented. Without a standard process, firms experience **workflow fractures, weaker reporting, and staff reverting to old habits.** We build the internal framework that makes Canopy work as a true firm-wide operating system.

OUR 4-PHASE FRAMEWORK

1 DISCOVERY

We understand your firm's structure & current work

- Organizational structure & staff roles
- Service lines & client types
- Variations between offices or teams
- How work flows through the firm today
- Current tax & bookeeping workflows
- Current Canopy usage (if applicabl)

Outcome: A clear picture of how the firm operates and where gaps exist.

2 FOUNDATION DESIGN

We establish standards & build the Canopy framework

- Firm-wide naming conventions & data structure
- Standardized workflow templates
- Automation opportunities
- Defined roles, responsibilities & services
- Task structures & review checkpoints
- Quality control & reporting framework

Outcome: A scalable, consistent operating foundation built inside Canopy.

3 PILOT & TRAINING

We validate the framework & build staff confidence

- Pilot implementation with one office or team
- Hands-on staff training sessions
- Leadership alignment & adoption planning
- Real-world workflow validation & refinement
- Edge case identification & resolution
- Confidence checks before full rollout

Outcome: A proven model and a trained team ready for firm-wide deployment.

4 FULL ROLLOUT & PERFORMANCE REPORTING

We deploy the standardized operating model firm-wide

- Workflow installation across all offices
- Production & profitability reporting setup
- Firm-wide staff training & adoption support
- Ongoing evaluation & refinement

Outcome: Unified operations, reliable reporting, and a platform for scalable growth.

Liz Scott is an accounting technologist and workflow architect who helps firms turns software into practical, usable operating systems —built for real-world complexity, tax season pressure, and multi- office growth.

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