

# Accounting App Evaluation Checklist

*A guide to evaluating and selecting  
the right apps for your firm*



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# Why is it important to standardize your app selection process?

In March 2017, Accountex released version 3.0 of their [Accounting Technology Ecosystem](#) visual. With three new categories and over 700 total products included in the graphic, Accountex noted that the ecosystem had doubled in size over the previous year.

It’s an exciting time to be in the accounting/bookkeeping space. New tech developments are enabling more automation capabilities, allowing accounting and bookkeeping firms to spend less time on administrative tasks. As a result, accountants are empowered to become better business advisors.

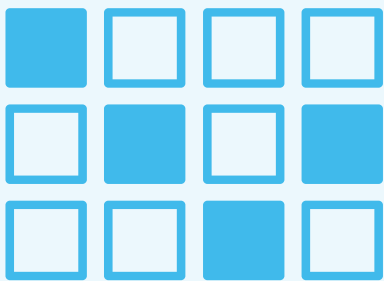
However, the sheer number of available accounting apps (*not to mention the fact that this number is quickly growing*) can be intimidating. Even the most tech-savvy accountants and bookkeepers are experiencing some degree of app fatigue, which can negatively impact a firm’s efficacy in several ways.

For some firms, the exploding landscape might discourage them from discovering new solutions altogether, causing them to miss exciting tech opportunities. Others might fall victim to “shiny object syndrome” and hastily chase after all the new apps without properly vetting them, causing tech stack redundancies.

Part of being a better business advisor means understanding the apps that will enable your clients to achieve their business goals. Standardizing your app evaluation and selection process will not only help to ensure you’re making the right choices as to which apps to use, but will also help you stay on top of changes in the ever-growing landscape.

## App fatigue:

The overwhelming feeling that there are too many apps to choose from.



This guide will provide you with a high-level framework which you can use to standardize your firm’s process for evaluating and selecting the right accounting apps for your firm.



# Who should be involved in the app selection process?

The question of who should be involved with app evaluation and selection varies among best-in-class firms. A new role that many modern accounting and bookkeeping practices are introducing to their firm is that of a **“technologist”**, or someone who manages a firm’s entire technology stack.

At a high level, the key responsibilities of the technologist include:

- Discovering new app solutions and how they’ll resolve inefficiencies in your workflows
- Overseeing the app evaluation and selection process
- Assisting with technology implementation
- Acting as the main point of contact between the firm and the app’s support/success team
- Auditing and maintaining the effectiveness of the technology stack

If your firm is just starting to leverage cloud accounting apps and add-ons, introducing a dedicated technologist likely won’t be necessary to get everything up and running smoothly. However, as your firm expands upon your standardized tech stack and your number of clients (and as the cloud accounting tech ecosystem continues to grow), it’s a good idea to consider building a function dedicated to the maintenance and optimization of your firm’s technology.

If your firm has no plans to bring on a technologist in the foreseeable future, it’s still a good idea to dedicate some resources to the growth and maintenance of your firm’s tech stack. Either assign one person internally to take on these responsibilities part-time, or book some time each month for your team to review your apps. Another option is to leverage consultants or cloud accounting technology experts (especially if you feel unfamiliar with the ecosystem) – use online forums, social media, and/or your own network to find someone to whom you can outsource your technology implementation and maintenance.



**Webinar: How to increase practice efficiency and improve your client experience**

To learn more about operating with a dedicated technologist at your firm, watch this webinar featuring Cindy Hovig, founder of Beyond Balanced Books.

**WATCH NOW**

# How long does it take to properly evaluate an app?

The time it takes to properly evaluate an app will depend on a few factors, including your familiarity with the industry, the complexity of the app itself, and the extent to which it will impact your firm and your clients' businesses.

For example, if it's an app that will play a role in your clients' monthly financials, then you should test it for at least one monthly cycle. However, if it's an app that will have a major impact on the way you and your clients do business, it's necessary to evaluate it for as long as it takes to validate that it will drive the results you need.

When taking advantage of free trials, don't let timeframe limitations dictate the length of time in which you try the app. Often, you can request to extend your free trial (e.g., 14 days). Or, some apps provide a free account for accounting/bookkeeping firms,

and you can test using this type of account before you start bringing on your clients. (*Note: never test apps with live data!*)

In our checklist, we'll outline testing best practices, as well as provide a list of considerations at each stage of the app evaluation process to help you determine if the app meets your standards. We recommend that you go through each stage in its entirety, regardless of the amount of time that it takes. Even if the issue you're looking to resolve is pressing, don't rush through the evaluation process – choosing something in haste will only lead to more problems down the line.

See [Appendix A: App Evaluation Checklist](#) for a complete list of items to test and questions to ask when assessing an app.

If you've gone through each stage thoroughly and the app simply isn't solving your business problem, then it's time to seek other solutions.

# App evaluation process & checklist

Before we launch into the high-level steps and considerations for evaluating an app, it's important to point out that this process will vary depending on the business problem you're trying to solve, the apps you're evaluating, and your particular firm's clients and processes.

What's most important is that you **standardize this process** and thoroughly **evaluate every new app** according to the necessary criteria. Tailor this process as needed in order to make an informed decision.

**PRO TIP:** You can jump to any step in the process by clicking on the circles in the navigation tool. It looks just like the process illustration on this page, and will be located in the top-right corner of your screen.



# Needs analysis



What comes first: the app, or the need for the app?

Best-in-class accountants and bookkeepers agree that it's critical to identify your business need, first and foremost, *then* seek the technology that can help you meet this need.

Given the nature of the exploding app ecosystem, odds are you'll hear of an app from a colleague or at a conference, and you'll be tempted to check it out – and there's nothing wrong with that! Expanding your knowledge and staying on top of the quickly changing landscape is critical for being an informed advisor. However, an efficient tech stack requires each application to fulfill a specific purpose – it simply doesn't make sense to find a cool app, then try to work it into your workflows (if it's unnecessary to your business).

Performing a “needs analysis” doesn't have to be a formal step in your app evaluation and selection process. You should consistently look to identify your firm's inefficiencies and check in with your clients to see where processes might be improved. Consider the following steps as guidelines for discovering ways to uncover inefficiencies and improve your workflows. From there, prioritize your needs based on the amount of time you'll save and how many clients will be impacted by a change/resolution to an issue.

## Identifying inefficiencies & pain points

### DOCUMENT YOUR WORKFLOWS

Map out your workflows to understand potential areas of improvement. Pay attention to areas where the process is slow, or consistently runs into a particular bottleneck, or doesn't seem to be as transparent as it could be – these are all areas that can be improved with technology. This free [Bookkeeping Workflow Template](#) can help you get started.

### FIND OUT WHO OWNS THE PROCESS

A common reason why processes break down or fail is because there is a lack of clarity regarding ownership. If no one in the organization has been assigned to manage a particular process or workflow, try to resolve it by putting someone in charge. If inefficiencies are still experienced, *then* turn to technology.

### CONSULT YOUR CLIENTS

Your clients are your most valuable source of information. If you've mapped out your workflows and have discovered potential inefficiencies, ask your clients to corroborate. Or, ask where they feel their experience working with your firm could be improved and seek solutions based on their insight.

### IDENTIFY MISSED OPPORTUNITIES

Adding applications isn't always about solving for a particular problem; sometimes, it's about generating an opportunity for your practice. It's important to ask yourself: what other services do you want to be able to offer your clients? Sometimes the answer will be found in an app that can streamline your business and free-up time to offer your clients a new service or experience, and other times the opportunity might be found in leveraging a new app as a tool within your client engagements.





# App discovery

Once you've defined a business need/opportunity/process that could be improved with technology, it's time to find the tools that can help to fix it.

Discovering apps isn't difficult, but finding the right apps can be a challenge (especially in the crowded accounting tech ecosystem).

A simple Google search is always a great way to get started, especially if you're unfamiliar with the landscape. Best-in-class accountants and bookkeepers also recommend app marketplaces, events, and the accounting/bookkeeping community as valuable resources for both app discovery and evaluation.

## App discovery channels

### APP MARKETPLACES


App marketplaces (such as the [QuickBooks App Store](#) or the [Xero App Marketplace](#)) are excellent resources for finding apps that integrate with your existing tech stack. Marketplaces also enable easy discoverability as they usually categorize solutions, as well as help with evaluation by providing comprehensive reviews.

### EVENTS

Events such as conferences, meetups, and roadshows are a great way to discover new apps, especially if you've got a lot of questions. Keep in mind that events can be costly (in both time and money) and the timing of the event might not align with urgent business problems; however, they're recognized as one of the best methods for connecting with the community and staying up-to-date about apps! *Not sure which events to attend? Check out [Appendix B: Always Up-to-Date Accounting Events List for ideas.](#)*

### COMMUNITY CHANNELS

The accounting and bookkeeping community is probably your best, most reliable source when it comes to learning about new apps. Don't be afraid to lean on the community to ask questions about potential solutions and their experience working with particular apps! The best way to connect with the community is through social media — in particular, Facebook Groups are especially helpful for gathering information.

 Here are some Facebook Groups to help you get started:

- [The Successful Bookkeeper](#)
- [Accountants of the Future](#)
- [The Workflow Watering Hole](#)
- [Business Workflow and Management](#)
- [QB-HQ](#)





# App screening

It's critical to perform your due diligence to decide whether or not it's worth your time to do a free trial of the app.

Vetting the app can be done in conjunction with app discovery. If the app is one of a number of competitive solutions, or if you're looking for a tool that will significantly change your business' processes or workflows, make a short list of app contenders that you'll screen more thoroughly during this phase.

The outcome of this step should be an even shorter list (consisting of no more than two to three apps) that you'll evaluate more thoroughly during the next stage of the app selection process (free trial and evaluation).

Here is a list of questions to ask when initially vetting an app. Modify this list as it applies to your business and the app itself.

- What is the business problem that the app solves?
- Who is the app's ideal client / customer?
- How long has the app been in business?
- How many of my clients would benefit from this app?
- Does the app integrate with my current accounting system?

APP SCREENING QUESTIONS	VENDOR A	VENDOR B
What is the business problem that the app solves?		
Who is the app's ideal client /customer?		
How long has the app been in business?		
How many of my clients would benefit from this app?		
Does the app integrate with my accounting system?		

**PRO TIP:** When attending events or roadshows where multiple vendors will be present, bring along a copy of this list to ensure you're getting all the information you need when chatting with them at the booth. Even better, create a Google Sheet that you can update as you visit vendors — list the questions under column A, then each vendor in columns B, C, etc.

# Free trial & evaluation

Your free trial is the most important step when evaluating a new app.

It is during this process that you'll actually test the app with your own data, processes, and systems, and (most importantly) ensure that it resolves your business need.

The first rule of running a successful app trial: never test the app using live data (your clients' or your own firm's). Create sample data (e.g., using a QuickBooks Online or Xero free trial account), add some transactions, and test the app using this data. It's also a good idea to create email accounts dedicated to testing purposes (that way, you don't have to sign up for a trial account using a real email address – save this address for when you actually sign up for the app).

For an in-depth list of items to test and consider when evaluating an app, see [Appendix A: App Evaluation Checklist](#).

## Testing checklist

When testing the app, be sure to thoroughly review the following areas:

### FEATURES & INTEGRATIONS

Testing features and integrations will dominate most of your trial activities.

**Action Items:**

- ☐ Test the app in your workflow
- ☐ Set up integrations with other systems (e.g., accounting software)
- ☐ Test the flow of data
- ☐ Test the mobile experience (if applicable)

**Evaluate:**

- ☐ How well does the app work with other systems?
- ☐ On what platforms can the app be used (i.e., Mac, Windows, etc.)?
- ☐ How long does it take to set up integrations and manage the flow of data?
- ☐ Is the flow of data accurate and meaningful?
- ☐ Is the app's user interface intuitive?
- ☐ Does the app actually do what it's meant to do?
- ☐ How well does the app actually solve your business need?
- ☐ Is the app something the client would be comfortable with?

### SUPPORT

Don't just ask about support — put it to the test, whether you actually require support or not. Should something go wrong as a customer, you want to ensure they're there to help you so you continue to provide an amazing client experience.

**Action Items:**

- ☐ Send in a support ticket/request via email
- ☐ Search the online support library (e.g., a Help Desk or Resource Center) for an answer

**Evaluate:**

- ☐ Response time
- ☐ Level of helpfulness

### IMPLEMENTATION & TRAINING

If implementation and training is a self-serve model, ensure you're able to access all the resources you need.

**Action Items:**

- ☐ Consult training documents/articles/videos (e.g., in their Help Desk or Resource Center)
- ☐ Consult implementation/training team (if applicable)
- ☐ Complete certification program (if applicable)

**Evaluate:**

- ☐ Time for training/implementation
- ☐ Helpfulness of implementation/support team (if applicable)

### SECURITY

All client data is sensitive data. Ensure the app has protocols and procedures in place to ensure your sensitive data remains secure.

**Action Items:**

- ☐ Request and review security/privacy policy

**Evaluate:**

- ☐ Ensure policy complies with your clients' protocols

### INNOVATION & DEVELOPMENT

Most apps haven't been around for more than a few years. Evaluating their plans for growth and innovation will help to ensure that they'll be around for a while and will grow with your firm.

**Action Items:**

- ☐ Inquire about frequency of updates
- ☐ Inquire about funding and plans for innovation

**Evaluate:**

- ☐ Does the app prioritize improvement and development?
- ☐ Will the app consider your requests for improvements?
- ☐ Will the app be around for the foreseeable future?



# Free trial & evaluation:

## *other considerations*

A few other items that should factor in to your evaluation process (but are often difficult to test or measure) include:

### RELATIONSHIP BUILDING

- ☐ Do you foresee the app's team as one with whom you'll be able to forge a lasting partnership?
- ☐ Are they trying to rush you into making a decision, or are they being genuinely helpful?

### PEER INSIGHT

- ☐ Are reviews generally positive?
- ☐ Have you asked firms who have resolved a similar pain point why or why not they went with the app?
- ☐ What do users feel are the key areas of improvement for the app?

### LEARNING CURVE

- ☐ How long will it actually take your team and your clients to get comfortable with the new tool and the new process?
- ☐ How much ongoing training will be required?

### CLIENT EXPERIENCE

- ☐ Aside from improving a process and/or resolving a pain point, how will the app improve your client experience?

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If you've been thorough with uncovering your needs, discovering the right apps, screening the apps, and testing them, then you'll have all the information you need to make an informed decision. Better yet, you'll have it documented in a standardized process so you can have full conviction in your decision!





# Ongoing evaluation

Standardizing your app selection process doesn't mean that app evaluation should be a "one and done" process.

Auditing your technology on a regular basis will help to increase efficiencies in your technology stack and ensure that your tools are working optimally.

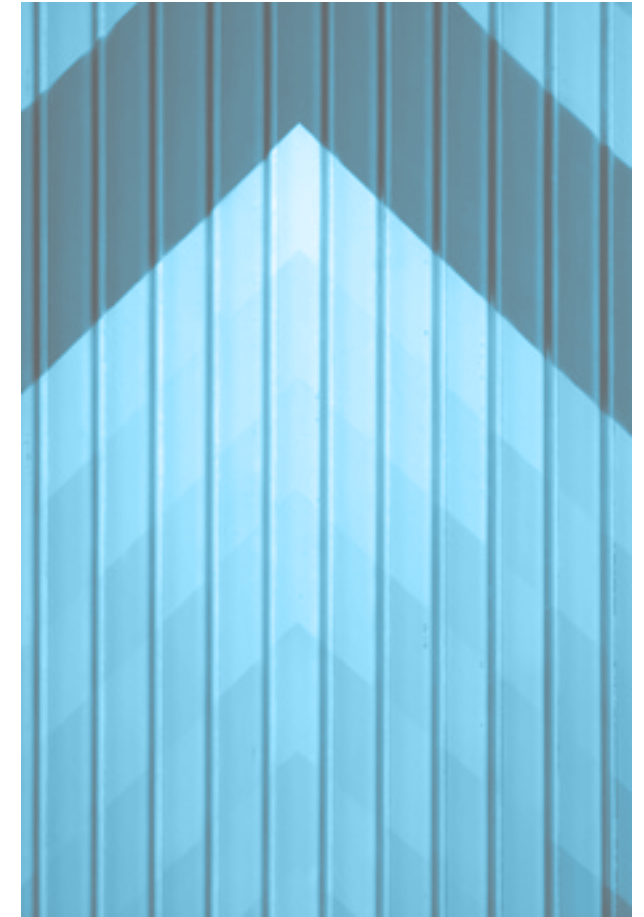
Some firms perform a formal audit annually or monthly. Some are less formal, auditing as licenses need to be renewed or as problems arise.

When auditing your tech stack, consider the following questions:

- Has the app fully resolved the business need for which we implemented it?
- Is everyone (i.e., clients and applicable staff) using the app consistently?
- How do our clients feel about the app, overall?
- Has the app released any features or improvements that we've requested (or indicated that they have plans to do so)?
- Has the app released any major features, integrations, or updates?
- Would I endorse this app or recommend it to a fellow accountant or bookkeeper?

Keep a copy of your [App Evaluation Checklist \(Appendix A\)](#) on file to review when auditing your accounting technology stack. That way, you can revisit any requested improvements and see how the app has evolved in the time you've been using it. Look for opportunities to use additional features to ensure you're using the app to its full potential.

As the accounting app ecosystem continues to evolve, it's important for accountants and bookkeepers to keep their finger on the pulse of new technology (as well as their own tech stack). App evaluation, selection, and management are now critical processes for firms that wish to improve their client experience and thrive in the future.



# Appendices & Acknowledgements

## APPENDIX A

# App evaluation checklist

When in the “testing” phase of your app evaluation process, make a list of the criteria with which you wish to evaluate the app.

Follow the link below to access our App Evaluation Checklist, but use this document as a starting point.

Add your own requirements, and update them depending on the business need you’re looking to fulfill.

To modify the checklist:

1. [Click here](#) to access the checklist via Google Sheets.
2. In the Google Sheet, click “File” in the top left corner.
3. Select “Make a copy” to create an editable version of the document in Google Sheets, OR select “Download as” and select your preferred format. (You’ll be able to download the document as an Excel file or CSV.)

**ACCESS THE CHECKLIST**

## APPENDIX B

# Always up-to-date global accounting events list



Events are a great way to discover new apps and / or ask questions about apps you’re vetting, as well as expand your network.

It’s worth the investment to try to make it out to at least one or two big conferences every year, and more roadshows and local events, if you can!

To help you discover events (and get them in your calendar as early as possible), we’ve put together an always up-to-date accounting events list — click the button below to check it out and get some events on your calendar!

**ACCESS THE EVENTS LIST**





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