



TECHNOLOGY STACK CHECKLIST

A guide to building a technology stack to
efficiently manage communication, files,
and workflow.

Summit
VIRTUAL CFO

BY  ANDERS

Why is it important to standardize your technology stack?

Best-in-class firms usually operate using a standardized technology “stack” of applications that help automate their workflow. The applications you use should be seen as an extension of your business. Your onboarding process will be more effective if your team can forgo learning a new set of tools every time a new client comes on board.

At Summit Virtual CFO, we have three primary technology stacks:



Admin



**Audit, Production
& Tax**











Marketing

Summit
VIRTUAL CFO










BY  ANDERS

Summit Virtual CFO Technology Stacks



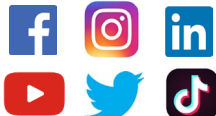





01 Admin

Accounting Software	
Bill Pay	
Client Interaction	
Cloud Storage	
Expense Management	
Forecasting	
Internal Communication	
Meeting Scheduling	
Productivity Tools	
Recruiting	
Security	
Task Management	
Time Tracking	
Workflow Automation	
Payroll	

02 Production & Tax

Production	
Accounting Software	
Bill Pay	
Dashboarding	
Data Visualization	
Expense Management	
Forecasting	
Time Tracking	
Payroll	
Tax	
Tax Software	
















03 Marketing

Website and CRM	
Sales & Lead Generation	
Social Media	
Social Media Scheduling	
Podcasting	
Planning and Design	
Audio and Video	
Client Feedback	

The Summit Virtual CFO by Anders Admin Tech Stack

Our Admin Tech Stack includes the tools we use internally. These tools help our team collaborate and communicate effectively online since we do not work in the same location.

Summit Virtual CFO by Anders Admin Technology Stack

Accounting Software	
Bill Pay	
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Payroll	

Accounting Software



Sage Intacct is a cloud-based financial management and accounting software designed to help businesses streamline their financial processes and gain real-time visibility into their financial health. With its scalable and flexible nature, Sage Intacct enables organizations to automate repetitive tasks, improve accuracy, and make informed decisions based on accurate financial data, ultimately driving operational efficiency and growth.































*This is our firm’s preferred accounting software, but we use whichever program the client uses.

Summit Virtual CFO by Anders Admin Technology Stack

Accounting Software	sage Intacct
Bill Pay	Bill.com
Client Interaction	
Cloud Storage	
Expense Management	Expensify Divvy emburse tallie
Forecasting	Jirav
Internal Communication	
Meeting Scheduling	calendly
Productivity Tools	AUTOREVIEW <small>Time Review - Time Automation</small>
Recruiting	greenhouse
Security	CROWDSTRIKE
Task Management	ClickUp
Time Tracking	CCH Access ClickUp
Workflow Automation	zapier lectroNeek make
Payroll	paycom



Bill.com is a cloud-based, collaborative business payments platform that automates every step of paying and getting paid, making life easier for businesses of all sizes. It's a simple, powerful solution for any business, from sole proprietorships to large enterprises.

Accounting Software	sage Intacct
 Bill Pay	bill
Client Interaction	   
Cloud Storage	  
Expense Management	 Expensify  Divvy  emburse  tallie
Forecasting	 Jirav
Internal Communication	  SOCOCO
Meeting Scheduling	 calendly
Productivity Tools	    <small>AutoReview</small>
Recruiting	 greenhouse
Security	  CROWDSTRIKE
Task Management	 ClickUp
Time Tracking	 CCH Access  ClickUp
Workflow Automation	 zapier  lectroNeek  make
Payroll	 paycom

Client Interaction



GoToMeeting is a web-hosted online meeting, desktop sharing, and video conferencing program that enables us to meet via the Internet in real time.



Zoom is the leader of modern enterprise video communications. It has an easy, reliable cloud platform for video and audio conferencing, chat, and webinars.
































Microsoft Outlook is the email client included with the Microsoft Office suite.



Slack is a collaboration hub with real-time messaging and file sharing features.

Summit Virtual CFO by Anders Admin Technology Stack

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Payroll	 paycom

Cloud Storage



SharePoint empowers teamwork with dynamic and productive team sites for every project team, department, and division. You can share files, data, news, and resources and customize your site to streamline your team's work.



Microsoft's cloud services allow you to access and share your files and photos from anywhere, on any device.



Google Drive offers secure cloud storage and file backup - store, open, and edit your files on any device.

Summit Virtual CFO by Anders Admin Technology Stack

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Workflow Automation	zapier
Payroll	paycom

Expense Management



From receipt scanning to reimbursement, Expensify automates every step of the expense reporting process.



Divvy is a financial technology platform that provides businesses with expense management tools, helping them streamline expense tracking, budgeting, and spend control.



Emburse Tallie is an expense management software that simplifies the expense reporting process by automating data capture, categorization, and reimbursement, improving efficiency and accuracy for businesses.

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Forecasting



Jirav is an all-in-one financial planning and analysis solution that maximizes the collaborative value of forecasting, budgeting, reporting, and analytics so leaders can drive their businesses forward with confidence and speed.

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Payroll	paycom

Internal Communication



Microsoft Teams is a collaborative communication and productivity platform that enables users to chat, video conference, and share files in one centralized workspace.



Sococo is a tool that creates a virtual office for your company. The name is a shortened version of the Social Communications Company.

Summit Virtual CFO by Anders Admin Technology Stack

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Payroll	paycom

Meeting Scheduling



Calendly is a simple, easy-to-use, yet powerful, scheduling software that aims to save time, accelerate sales, and improve service quality. It eliminates the old-school way of using email and phone tags for scheduling appointments, calls, interviews, demos, and more.

Summit Virtual CFO by Anders Admin Technology Stack

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Productivity Tools



Microsoft Office is a suite of products that includes Microsoft Word, Excel, Access, Publisher, PowerPoint, and Outlook. Each program serves a different purpose and is compatible with other programs included in the package.



Google Drive allows users to store files on their servers, synchronize files across devices, and share files.



A Smart, Robust and Reliable app designed for accountants that simplifies, streamlines and automates the Financial Review Process for QuickBooks online.

Summit Virtual CFO by Anders Admin Technology Stack


























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Recruiting	greenhouse
Security	CROWDSTRIKE
Task Management	ClickUp
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Workflow Automation	zapier lectroNeek make
Payroll	paycom

Recruiting

greenhouse

Greenhouse is a cloud-based recruiting software that helps companies streamline their hiring processes, from sourcing candidates to managing interviews and making data-driven hiring decisions.

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Security



CROWDSTRIKE

CrowdStrike is a cybersecurity company that provides cloud-delivered endpoint protection and threat intelligence solutions to help organizations detect, prevent, and respond to cyber threats in real time.

LastPass...

LastPass is a proprietary password management service that stores encrypted passwords in private accounts.

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Payroll	paycom

Task Management



An all-in-one suite to manage people, projects, and everything in between. Stop switching between multiple tools. With ClickUp, manage everything in one platform. Up and Running in Seconds.

Summit Virtual CFO by Anders Admin Technology Stack

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CCH Axxess is a cloud-based tax and accounting software solution that helps professionals streamline their workflow, manage client data, and automate various tasks, enhancing productivity and accuracy in tax and accounting processes.



Once again, ClickUp is a versatile project management and collaboration platform that allows teams to organize tasks, track progress and time, and communicate effectively in one centralized workspace.

*Our firm prefers to use CCH Axxess and ClickUp for time tracking, but we'll use whichever program the client uses.

Summit Virtual CFO by Anders Admin Technology Stack

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Zapier is a tool that allows you to connect applications you use every day to automate tasks and save time. You can connect any of the 1,000+ integrated applications together to make your own automations.



ElectroNeek is more than a software vendor - it's a business partner that supports the growth of MSP with zero-bot licensing, leads, sales and marketing.



Make (formerly Integromat) is an integration platform that enables users to connect various apps and automate workflows without coding, allowing for seamless data flow and process automation.

Summit Virtual CFO by Anders Admin Technology Stack

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Task Management	ClickUp
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Workflow Automation	zapier electroNeek make
Payroll	paycom

Payroll



Paycom is a cloud-based human capital management software that helps businesses streamline HR processes such as payroll, time and attendance tracking, talent management, and benefits administration, all in one integrated platform.


















Summit Virtual CFO by Anders Admin Technology Stack

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Recruiting	
Security	
Task Management	
Time Tracking	
Workflow Automation	

The Summit Virtual CFO by Anders Production & Tax Tech Stack

The second technology stack is our Production & Tax Tech Stack, which includes the tools we use to deliver services to our clients.

Summit Virtual CFO by Anders Production & Tax Tech Stack

Production	
Accounting Software	  quickbooks. Online
Bill Pay	 Divvy +  bill.com
Dashboarding	 REACH
Data Visualization	 REACH
Expense Management	 Expensify  Divvy  emburse tallie
Forecasting	 planguru  Jirav  REACH
Time Tracking	 HARVEST  10,000ft <small>by smartsheet</small>
Payroll	 gusto  ADP
Tax	
Tax Software	 CCH Access

Production I.



Xero is online accounting software for small businesses that lets you share your latest numbers with your team, keeping everyone up to speed.



Intuit QuickBooks is a popular accounting software designed for small and medium-sized businesses, offering tools for financial management, invoicing, expense tracking, and generating reports to simplify bookkeeping tasks.



Reach Reporting is a custom reporting solution for client reporting that shows tables, charts, and financial statements in a beautiful way. This software integrates with QuickBooks Online and Desktop.



PlanGuru helps finance professionals simplify complex budgeting and forecasting practices.

Note: Divvy, Bill.com, Tallie, Jirav, and Expensify were covered in earlier slides.

Summit Virtual CFO by Anders Production & Tax Tech Stack

Production I.	
Accounting Software	
Bill Pay	
Dashboarding	
Data Visualization	
Expense Management	
Forecasting	
Time Tracking	
Payroll	
Tax	
Tax Software	



10,000 ft. by Smartsheet is a resource management software that enables businesses to plan, track, and manage project resources, helping optimize utilization, forecast capacity, and improve overall project efficiency.

HARVEST

Harvest is a time-tracking and invoicing software that allows businesses to easily track time spent on projects, manage expenses, and generate professional invoices for accurate client billing.



Work is so much more than a paycheck. That's why we built Gusto to be a full-service payroll and people platform. From handling payroll taxes to answering your HR questions, we simplify complex tasks so you save time and feel like an expert.



ADP (Automatic Data Processing) is a comprehensive human capital management software that offers payroll, HR management, benefits administration, and time tracking solutions to help businesses streamline their workforce management processes.

Summit Virtual CFO by Anders Production & Tax Tech Stack

Production	
Accounting Software	
Bill Pay	
Dashboarding	
Data Visualization	
Production II.	
Time Tracking	
Payroll	
Tax	
Tax Software	

Tax



CCH Axxess Tax delivers a powerful set of innovative features designed to make the tax and accounting industry more efficient and profitable.





















Summit Virtual CFO by Anders Production & Tax Tech Stack

Production	
Accounting Software	
Bill Pay	+
Dashboarding	
Data Visualization	
Expense Management	
Forecasting	
Time Tracking	
Payroll	
Tax	
Tax Software	

The Summit Virtual CFO by Anders Marketing Tech Stack

The third technology stack is our Marketing Tech Stack. We use these tools to promote our company and our services online.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
Sales & Lead Generation	   HubSpot  Instapage  PURECHAT
Social Media	     
Social Media Scheduling	 
Podcasting	 Simplecast 
Planning and Design	  miro
Audio and Video	  Podsqueeze
Client Feedback	 Ask Nicely

CRM (Customer Relationship Management) & Website



HubSpot is an inbound marketing and sales software that provides a comprehensive set of tools and features, including CRM, email marketing, lead tracking, and analytics, empowering businesses to effectively manage leads, track sales activities, nurture prospects, and drive revenue growth.

Summit Virtual CFO by Anders Marketing Tech Stack

Website & CRM	HubSpot
Sales & Lead Generation	HubSpot
Social Media	
Social Media Scheduling	
Podcasting	
Planning and Design	
Audio and Video	
Client Feedback	

Sales & Lead Generation I.



PandaDoc empowers sales teams to streamline their process to generate, negotiate, and eSign proposals, quotes, and contracts.



























Quoter simplifies the sales quoting process by bringing all of the product, pricing, and proposal information to a single place that's easy to manage.



StreamYard

Streamyard is a live streaming platform that enables content creators to produce professional-quality live broadcasts and engage with their audience through various social media channels.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
 Sales & Lead Generation	     
Social Media	     
Social Media Scheduling	 
Podcasting	  
Planning and Design	 
Audio and Video	 
Client Feedback	 

Sales & Lead Generation II.
























PureChat is a live chat software that allows businesses to engage with website visitors in real-time, providing instant customer support and facilitating lead generation and conversions.



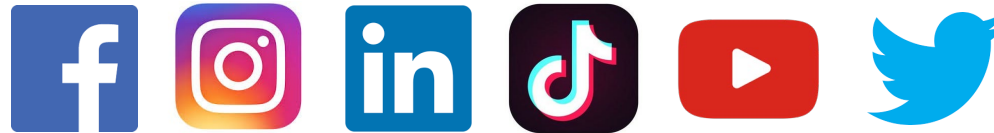
Instapage is a landing page software that enables businesses to create and optimize high-converting landing pages without the need for coding, helping drive targeted conversions and maximize advertising campaign performance.

Note: HubSpot was covered in earlier slides.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
 Sales & Lead Generation	    
Social Media	     
Social Media Scheduling	 
Podcasting	 Simplecast 
Planning and Design	 
Audio and Video	 
Client Feedback	 Ask Nicely

Social Media



We use Facebook, Instagram, LinkedIn, TikTok, YouTube and Twitter for social media marketing.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
Sales & Lead Generation	HubSpot
Social Media	
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Podcasting	
Planning and Design	
Audio and Video	
Client Feedback	

Social Media Scheduling



Later is the all-in-one social marketing platform for the top social networks. Plan, analyze, and publish your content in a few clicks – so you can save time and grow your business.



Clearview Social is designed for professional services firms, enabling them to easily curate and share content across their team's social networks to enhance brand visibility and engagement.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
Sales & Lead Generation	HubSpot, Instapage, PURECHAT
Social Media	Facebook, Instagram, LinkedIn
Social Media Scheduling	Later, Clearview Social
Podcasting	Simplecast
Planning and Design	Canva, Miro
Audio and Video	Podsqueeze
Client Feedback	Ask Nicely

Podcasting





















Simplecast

Simplecast is a podcast hosting and analytics platform that simplifies the process of publishing, distributing, and analyzing podcast episodes, allowing creators to reach their audience and track performance effectively.

Note: Streamyard was covered in earlier slides.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
Sales & Lead Generation	   HubSpot  Instapage  PURECHAT
Social Media	       
Podcasting	 Simplecast
Planning and Design	Canva  miro
Audio and Video	  Podsqueeze
Client Feedback	 Ask Nicely

Planning and Design



Canva is a graphic design platform, used to create social media graphics, presentations, posters, documents and other visual content. The app includes templates for users to use. The platform is free to use and offers paid subscriptions like Canva Pro and Canva for Enterprise for additional functionality.



Empower cross-functional discovery and brainstorming through an infinite canvas, robust set of widgets, prebuilt templates, and powerful platform capabilities. Miro presents an entire toolkit for user story or customer journey maps, wireframing, roadmap or sprint planning, retros, and more.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
Sales & Lead Generation	HubSpot, Instapage, PURECHAT
Social Media	Facebook, Instagram, LinkedIn, YouTube, Twitter, TikTok
Social Media Scheduling	Later, Canva
Planning and Design	Canva, Miro
Audio and Video	Podsqueeze
Client Feedback	Ask Nicely

Audio and Video



VidyoAI is an AI-powered video editing platform that leverages computer vision and machine learning to analyze video content, extract meaningful insights, and enable businesses to share them easily on social media platforms.



Podsqueeze is a software platform designed to help podcasters streamline their workflow, providing features such as automated audio editing, transcription services, and podcast hosting to simplify the production and distribution process, ultimately enhancing the podcasting experience.

Summit Virtual CFO by Anders Marketing Tech Stack

Website and CRM	HubSpot
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Client Feedback	Ask Nicely

Client Feedback



AskNicely is a customer feedback and experience management software that helps businesses collect, analyze, and act on customer feedback to drive customer satisfaction and loyalty.

Summit Virtual CFO by Anders

Marketing Tech Stack

Website and CRM	HubSpot
Sales & Lead Generation	<div> </div> <div> </div>
Social Media	<div> </div> <div> </div>
Social Media Scheduling	<div> </div>
Podcasting	<div> </div>
Planning and Design	<div> </div>
Audio and Video	<div> </div>
<div> <div>Client Feedback</div> </div>	<div> </div>

Summary

Technology is always changing. To stay ahead of the game, we have to be willing to adapt by using the latest technology. Doing so allows us to continue providing the best service possible to our clients.

Our three primary technology stacks help us keep our team connected and our firm connected to our clients.

