Practice Management Software Vendor Comparison Scorecard for Small to Mid-Sized Accounting Firms

A simple worksheet to evaluate practice management platforms based on your firm's real workflows and operational needs.

Bring this scorecard into vendor demos to compare platforms objectively.

How to Use This Scorecard

Step 1: Before evaluating vendors, identify which features are must-have requirements for your firm.

Step 2: During each demo, assign a 1–5 score for how well the platform supports each capability.

Step 3: Compare vendors based on:

- Must-have coverage
- Overall feature scores
- Any operational gaps revealed during evaluation

Scoring Guide

1	**Not available**
2	**Limited capability or workaround required**
3	**Basic capability**
4	**Strong capability**
5	**Excellent / purpose-built**

Try to score each platform during the demo while the workflow is fresh.

Workflow & Operational Visibility

These features ensure that work moves consistently across the firm.

Requirement	Must Have	Vendor A	Vendor B	Vendor C	Notes
Recurring workflow templates for core services	☐				
Clear task ownership with role-based assignments	☐				
Firm-wide dashboard showing active work	☐				
Track engagement status and deadlines	☐				

Client Experience & Document Collection

These features improve how clients interact with the firm and reduce document chasing.

Requirement	Must Have	Vendor A	Vendor B	Vendor C	Notes
Secure client portal for document sharing and communication	☐				
Standardized document request lists for recurring services	☐				
Automated reminders for missing documents or pending client actions	☐				
Centralized client communication history tied to engagements and tasks	☐				

Time Tracking & Billing

These features ensure firms capture revenue accurately and invoice efficiently.

Requirement	Must Have	Vendor A	Vendor B	Vendor C	Notes
Time tracking tied to client engagements	☐				
Flexible billing options (hourly, fixed fee, recurring)	☐				
Work-in-progress (WIP) visibility before invoicing	☐				
Integrated payment collection or payment processor integration	☐				

Reporting & Firm Visibility

These capabilities give partners operational and financial insight.

Requirement	Must Have	Vendor A	Vendor B	Vendor C	Notes
Client realization reporting (billed vs realized revenue)	☐				
Work-in-progress reporting across engagements and staff	☐				
Capacity or workload visibility across the team	☐				
Profitability or revenue reporting by client or service line	☐				

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Integrations & Implementation

These determine how well the platform fits into your existing tech stack and how smoothly it can be adopted.

Requirement	Must Have	Vendor A	Vendor B	Vendor C	Notes
Integration with general ledger platforms (QuickBooks, etc.)	☐				
Integration with engagement/proposal tools or other firm software	☐				
Structured onboarding and workflow setup support	☐				
Ongoing training resources and vendor support	☐				

Score Summary & Decision Worksheet

Vendor Comparison Summary

Must-Have Coverage

Total Must-Have Features Identified: _____

Vendor	Missing Must-Have Features
Vendor A	
Vendor B	
Vendor C	

If a platform cannot support one or more must-have requirements, it may not be the right fit for your firm's current workflows.

Overall Vendor Impression

Vendor	Overall Score (1–5)
Vendor A	
Vendor B	
Vendor C	

Key Concerns or Limitations

Vendor	Concerns / Limitations
Vendor A	
Vendor B	
Vendor C	

Low scores or missing features often reveal workflow gaps, integration limitations, or usability concerns.

Decision Readiness

Use the checklist results and your demo notes to determine your firm's next step.

☐	**We need to standardize our internal workflows first**
☐	**We are selecting the platform that best fits our firm today**
☐	**We are ready to move forward with implementation**

Want to see how Firm360 performs against these requirements?

Schedule a walkthrough built around your checklist and real workflows.

www.myfirm360.com/book-a-demo/