



# Rising Beyond the Challenge

Analyzing Changes in the Global Performance of  
Accounting Firms Before and After COVID

A KARBON PRACTICE EXCELLENCE SPECIAL REPORT



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## Executive Summary

The COVID-19 pandemic forced accounting firms to adapt at a speed and scale that was previously unimaginable. Overnight, businesses abandoned traditional workflows and embraced entirely new ways of operating.

Firms already using a cloud-based tech stack were forced to reconsider how they approached client service and internal collaboration in a remote-first world—a shift in mindset with some operational components.

But firms that had yet to fully transition to cloud technology faced extraordinary upheaval in order to survive—navigating operational disruptions, rapidly adopting technology, overhauling processes to accommodate technology, and often redefining their entire business model.

The key trend of successful accounting firms coming out of the pandemic and into this brave new world is a renewed focus on more efficient operations and truly doing more with less.

Efficiency was, and continues to be, key to unlocking and sustaining Practice Excellence.

# Methodology

## Practice Excellence Explained

Every accounting firm is different. Different clients, different staff, different maturity. But everyone in the profession faces similar core challenges. What sets successful practices apart is how they approach these challenges, the tools they use to enact change, and the structures and systems they have in place.

The biggest challenges facing firm owners do not relate to technical knowledge, but rather their ability to be successful business owners and entrepreneurs.

A firm's Practice Excellence score is the analysis of how it performs across key business abilities: Strategy, Management, Efficiency, and Growth. These are known as the Four Pillars. These Pillars house 12 key competencies.

Practice Excellence is calculated based on the results of a 20-minute online survey asking wide-ranging questions that evaluate a firm's proficiency in each of these areas. A score is then provided for each of the 12 competencies and aggregated to determine the scores for the Four Pillars—highlighting where a firm's specific strengths and weaknesses lie, and how they compare to other accounting firms.

Excelling in each of these competencies—and their overarching Pillars—is how a firm achieves a high level of Practice Excellence. Any firm that participates in the Practice Excellence Assessment can be categorized in one of these four levels of expertise:

- Quartile 1 (Q1): Traditional (bottom 25%)
- Quartile 2 (Q2): Transitioning (25-50%)
- Quartile 3 (Q3): Expanding (50-75%)
- Quartile 4 (Q4): Leader (top 25%)





“

The goal of Practice Excellence was to determine a way to identify the relative strengths and opportunities for a firm so they could take actions to better themselves and improve the outcomes for the firm and their clients.”

Ian Vacin, Co-Founder &  
Chief Partnerships Officer, Karbon

## About this Report

This report is a special analysis of how accounting firms fared during three distinct periods: pre-COVID, during COVID, and post-COVID. It focuses on the key factors that separated high-performing firms from the rest during these unprecedented times.

The basis of this analysis is Karbon's Practice Excellence Framework. Since the Practice Excellence Framework was developed in 2017, ongoing changes in scoring and indexing have been analyzed to highlight the evolution of Practice Excellence. This analysis provides a quantitative view of how firms have shifted priorities to adapt to changing dynamics and the success of these operational adjustments.

# Key Insights

## Efficiency is the Key Driver of Success

Firms that thrived through the COVID pandemic and continue to succeed are those that prioritize efficiency. Firms that focused on streamlining operations, embracing new technologies, and reimagining workflows have navigated the challenges effectively, leading to sustained success in the post-pandemic era.

## High-Performing Firms Focus on Business Processes

Business Processes have emerged as a key competency that sets leading firms apart. With a 71% correlation between the Business Processes competency and overall Practice Excellence scores, firms that invest in refining and optimizing their operational workflows tend to outperform peers.

## Intentional Management Strategies Improve Talent Retention

In response to remote work challenges and the talent shortage, firms have become more deliberate in their management approaches. Implementing regular meeting cadences, emotional intelligence assessments, standardized onboarding processes, and 360-degree performance evaluations have been key strategies to engage and retain employees.

## Client Engagement and Retention Remain Key Priorities

Firms have intensified their focus on strategies that enhance client satisfaction and loyalty. Increased attention to metrics like email response times, Net Promoter Scores (NPS), Customer Acquisition Costs (CAC), and client churn rates underscores the emphasis on maintaining and growing existing client relationships for sustainable profitability.

## Technology Adoption is Crucial for Operational Efficiency

The adoption of business intelligence tools, practice management software, and enhanced communication platforms has been pivotal. These technologies have enabled firms to visualize performance, centralize workflows, and maintain collaboration in a remote-first environment, leading to improved efficiency and productivity.

## The Pandemic's Silver Lining

The tools and techniques many firms were forced to implement in order to keep their firms operational during the pandemic will benefit them long after, setting them up for efficiency gains, increased revenue, happy clients, and satisfied employees.

# The Efficiency Era: Efficiency was the Key Driver of Success for Accounting Firms from COVID to Now

Accounting firms rose to the challenges of the past few years, particularly in overcoming difficulties from the COVID pandemic.

There are always many internal and external dynamics at play influencing a firm’s priorities and decisions. The pandemic supersized some of those dynamics—remote teams, increased tech adoption, talent shortages—while pressing pause on others like live events and in-person client meetings, for example.

Now that the pandemic itself can be seen in the rearview mirror, it’s important to look back and understand how exactly the industry got here—and how a focus on efficiency enabled firms to go from surviving to thriving.

## The Efficiency Timeline



\*Practice Excellence full year data capture began in 2018



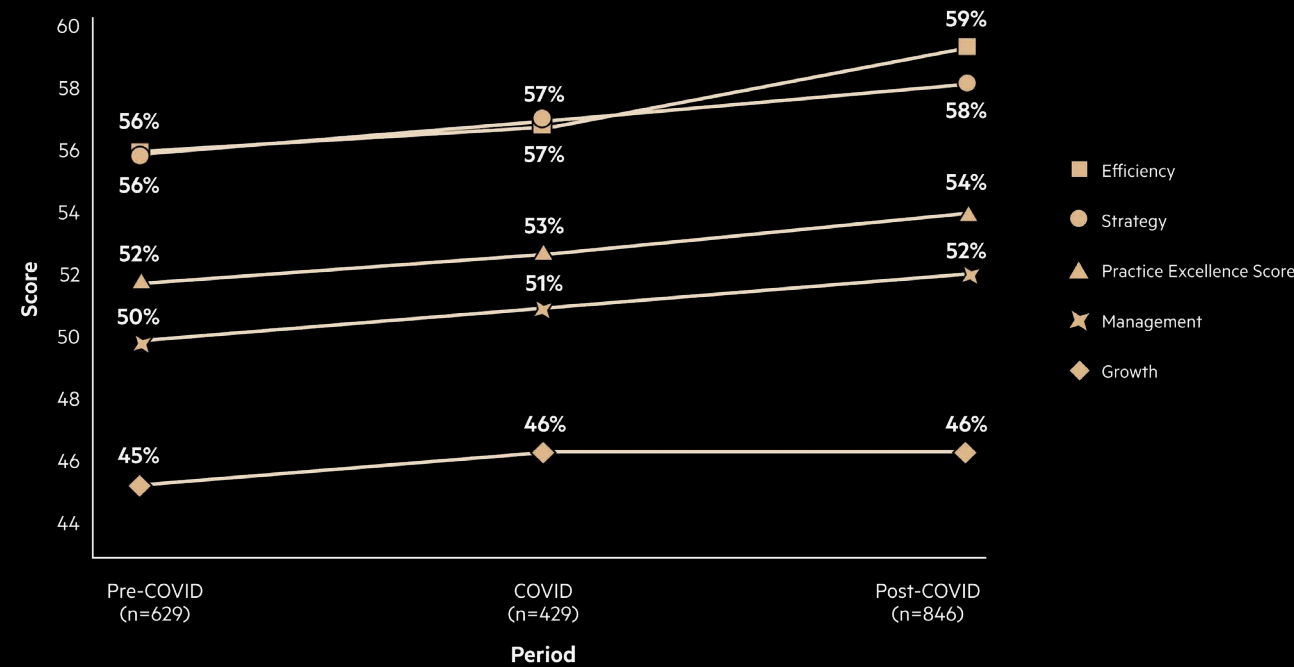
Growth Through Efficiency:  
Doing More with Existing Resources

Growth is often defined as having more—more clients, more services, more staff. But growth doesn’t mean the same thing for each firm. And it certainly doesn’t always mean more. In the case of Practice Excellence, the Growth Pillar is defined as client expansion.

Efficiency scores have risen notably from pre- to post-COVID, while Growth scores only increased by 1% from pre-COVID to during COVID and then remained flat post-COVID.

This indicates that firms are operating more efficiently and doing more with less, without increasing client count. The increases in Efficiency competencies are leading to firm expansion outside traditional Growth competencies.

Practice Excellence Pillars from  
Pre-COVID to Post-COVID



	Average Practice Excellence Pillar Scores and Average Overall Practice Excellence Scores				
	Efficiency	Strategy	Management	Growth	Practice Excellence
Pre-COVID (2018-2019)	56%	56%	50%	45%	52%
During COVID (2020-2021)	57%	57%	51%	46%	53%
Post-COVID (2022-2023)	59%	58%	52%	46%	54%

Here's what's happening:

- Firm owners have become more efficient with resources since the pandemic, adapting to the current economic environment.
- As a result, firms are focusing on expanding each client's share of wallet and increasing services per client, rather than adding new clients, which could strain resources further.
- This focus on existing client growth has deprioritized investments in broader growth activities.
- Firms are now training teams to cross-sell and up-sell, achieving efficient growth by maximizing existing client relationships instead of pursuing new clients.

A closer look at specific competencies shows significant improvements in both Business Processes and Technology, underscoring the ongoing drive for greater efficiency. Plus, the rise of AI and continued adoption of automation has presented firms with the ability to increase Efficiency without necessarily mandating team expansion—potentially further suppressing Growth scores.

## **How the Practice Excellence Competencies Changed**

During COVID, Practice Excellence scores remained mostly flat. Post-COVID, however, efficiency became even more important. Scores in Business Processes, Operations Management, Technology, Change Management, and Organizational Management have all improved significantly over 2018 levels.

This captures the 'rising to the challenge' sentiment perfectly. Firm leaders are applying lessons in efficiency learned during the pandemic to maintain stronger performance post-pandemic.

COVID’s impact on Practice Excellence Competencies:  
Before, During and Now



	How the 12 Practice Excellence Competencies Changed as a Result of COVID											
	Operations Management	Business Processes	Technology	Strategy Adoption	Business Strategy	Innovation	Marketing	Sales	Client Management	Organizational Management	Talent Management	Change Management
Pre-COVID (2018-2019)	67%	55%	66%	65%	58%	58%	40%	55%	50%	54%	56%	60%
During COVID (2020-2021)	69%	54%	68%	66%	59%	60%	40%	57%	51%	54%	59%	60%
Post-COVID (2022-2023)	72%	59%	72%	69%	59%	60%	42%	56%	52%	59%	58%	63%
Increase from pre- to post-COVID	7%	7%	9%	6%	2%	3%	5%	2%	4%	9%	4%	5%

## How Practice Excellence Pillars Changed Before vs. After COVID

The pandemic fundamentally transformed how accounting leaders approach key aspects of their firm's operations. In the face of unprecedented challenges, firms reevaluated and adapted their strategies across the Four Pillars of Practice Excellence.

The Efficiency Pillar saw the biggest changes, with larger focuses on business intelligence tools, practice management software, and improved communication methods—all with the intention to enhance efficiency and meet the demands of remote work. Management strategies became more intentional, with more emphasis on retaining and engaging talent. The Growth Pillar saw a decline initially as firms prioritized survival over expansion, but have since implemented digital strategies like SEO and specific targeting tactics like Ideal Client Profiles (ICPs). Finally, the Strategy Pillar saw greater focus on client retention, with firms using metrics like email response time, Net Promoter Score (NPS), and Customer Acquisition Cost (CAC) to foster sustainable growth and client satisfaction.

A deeper dive into each Pillar uncovers the broader evolution of the accounting profession as a result of the pandemic, highlighting resilience and adaptability from firms across the world.

## EFFICIENCY PILLAR

# The 3 Key Focus Areas for Firm Efficiency

As accounting firm leaders worked hard to transition to a new way of working, they identified three key levers that helped them operate more efficiently. These tools and techniques didn't just serve firms during COVID. Perhaps a silver lining of the pandemic is that it forced firm leaders to implement software that would benefit their firms long after COVID, setting them up for efficiency gains, increased revenue, happy clients, and satisfied employees.

### Business Intelligence Tools

You can't improve what you can't measure. Since COVID, accounting firm leaders have implemented business intelligence tools and techniques to help them visualize and understand their firm's performance. Then, and only then, can they begin to fine-tune their operations.

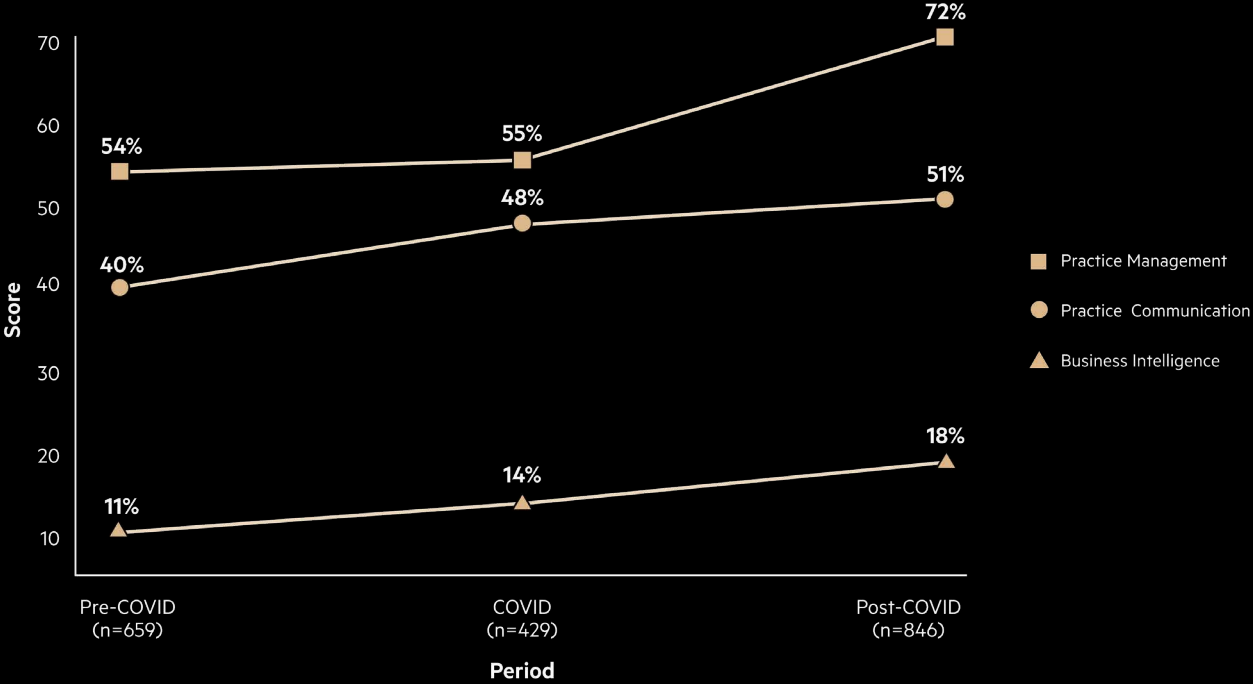
### Practice Management Software

When COVID forced offices to close, teams could no longer collaborate spontaneously. No more workflows written on a whiteboard or paper files passed around the office. Firms needed a tool that centralized their workflow and communication so that they could continue to function. Practice management software like Karbon helped them do just that, while helping to streamline operations.

### Practice Communication Tools

Similarly, remote work forced teams to find new ways to communicate. As a result, they implemented communication tools like Slack and Microsoft Teams to ensure they were still able to collaborate and keep production flowing. At the same time, firms needed reliable and secure ways to communicate with clients. They found this solution within their practice management tool or client portal app.

Biggest Efficiency Levers from  
Pre- to Post-COVID



	Changes in Efficiency Tools and Tactics from Pre- to Post-COVID									
	Cloud Email	Cloud Accounting	Practice Communication	Practice Management	CRM	Document Management	Task Management	Work Management	Business Intelligence	Capacity Planning
Pre-COVID (2018-2019)	85%	86%	39%	53%	35%	68%	44%	50%	11%	41%
During COVID (2020-2021)	93%	86%	48%	55%	31%	70%	43%	50%	14%	39%
Post-COVID (2022-2023)	94%	90%	52%	73%	39%	75%	53%	58%	18%	50%
Increase from pre- to post-COVID	11%	5%	33%	38%	11%	10%	20%	16%	64%	22%

## MANAGEMENT PILLAR

# Management Strategies are Focused on Intentionality

Remote work, the Great Resignation, and the talent shortage are causing firms to be more intentional in their management strategies. They're implementing more formal techniques to ensure their internal HR processes are streamlined and their employees are supported in their development.

### Meeting Cadence

Since moving to remote work, firm leaders have become more intentional in their formalized operating mechanisms, notably meeting cadence. Because teams were (and many still are) distributed, informal or impromptu team meetings were no longer possible. They needed to be formalized and more frequent. Regular meetings aren't just important for work production—they're critical in ensuring remote teams remain engaged and connected.

### Emotional IQ Tests

Emotional IQ tests provide valuable insight into an employee's emotional capabilities in the workplace so that firm leaders are able to understand how they manage relationships, handle stress, and adapt to change. This is a critical skill post-COVID, as Gallup's State of the Global Workplace report states that only 23% of employees worldwide feel engaged at work, while 62% are unengaged and doing the bare minimum, and 15% are actively disengaged and seeking new jobs.

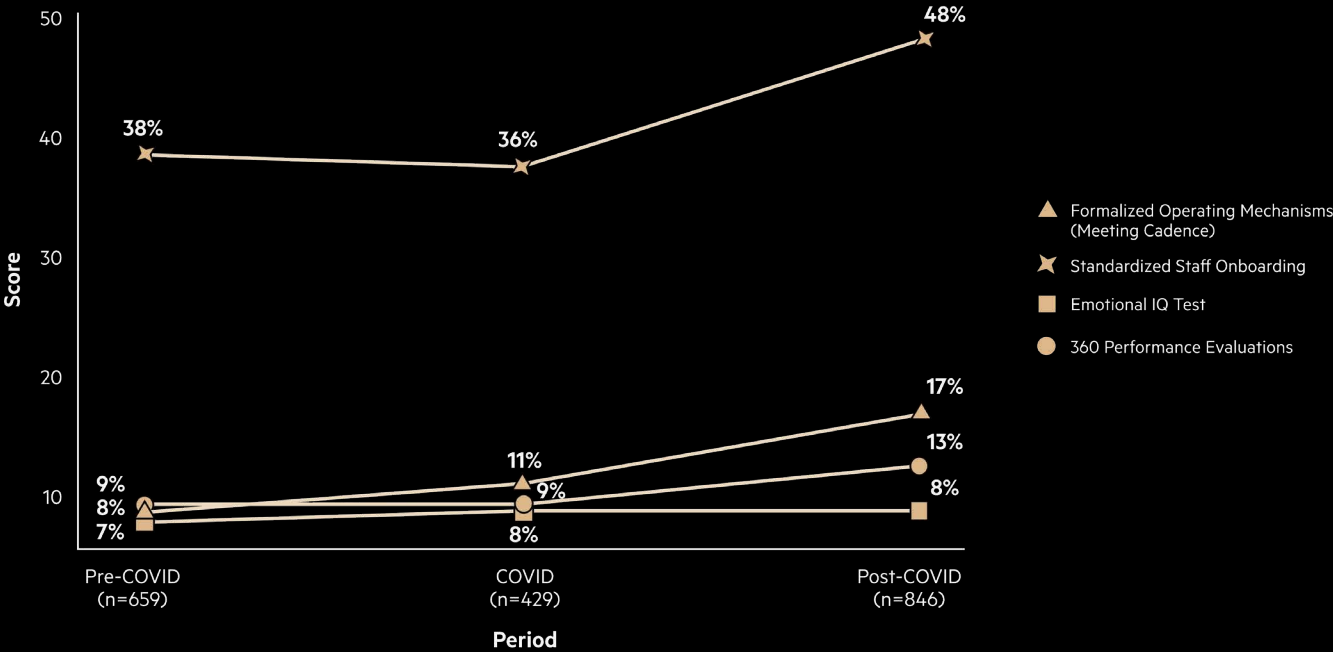
### Standardized Staff Onboarding

Onboarding new staff in a remote setting can be challenging, especially for firms unfamiliar with remote and hybrid environments. Key to ensuring a smooth and streamlined process for both employee and employer, firms implemented standardized staff onboarding procedures.

### 360-Degree Performance Evaluations

Employees value their career development, especially younger generations. In fact, 83% of Gen Z accounting professionals planning to quit in the next six months did not expect to advance at their current company. The increase in formalized performance evaluations from pre- to post-COVID indicates that firm leaders understand the need to retain top talent as labor shortages continue to threaten the profession.

Biggest Management Levers from  
Pre- to Post-COVID



Changes in Management Tools and Tactics from Pre- to Post-COVID

	Personality Tests	Communication Tests	Emotional IQ Tests	360 Degree Performance Evaluations	Performance Reviews	Objectives and Key Results (OKRs)	Meeting Cadence	Organization Evaluation and/or Redesign	Standardized Staff Onboarding	Formalized Staff Training Programs
Pre-COVID (2018-2019)	30%	19%	7%	9%	58%	19%	8%	25%	39%	32%
During COVID (2020-2021)	32%	18%	8%	9%	58%	17%	11%	27%	36%	34%
Post-COVID (2022-2023)	35%	20%	9%	13%	61%	22%	17%	31%	50%	39%
Increase from pre- to post-COVID	17%	5%	29%	44%	5%	16%	112%	24%	28%	22%



## GROWTH PILLAR

# Marketing Strategies Faced the Biggest Decline from Pre- to Post-COVID

When the pandemic hit, much like when a storm rages through a town, businesses battened down the hatches. When you're bracing for something as powerful and uncertain as the pandemic, you're likely not focusing too much on how to grow your firm, but rather, how to survive the ensuing economic uncertainty. Often, marketing is a function that is halted during these events. And that is what this research reflects. Growth activities generally declined from pre-COVID to during COVID, with some firms now beginning to revisit growth strategies like local events, content marketing, and newsletters.

Many firms are increasing revenue with their existing clients through bundling and expanding existing service offerings, while being more conservative with new client acquisition. This shift indicates that firms are strategically focusing their limited capacity on high-value clients.

### Persona Research and Ideal Client Profiles (ICPs)

Even before COVID, accounting firms began refining their approach to strategic client targeting. Now, Ideal Client Profiles (ICPs) and personas have become essential as firms look to maximize the efficiency of their limited resources. By focusing on ideal client types, firms can strengthen relationships, drive engagement, and deliver tailored services that increase share of wallet and overall profitability.

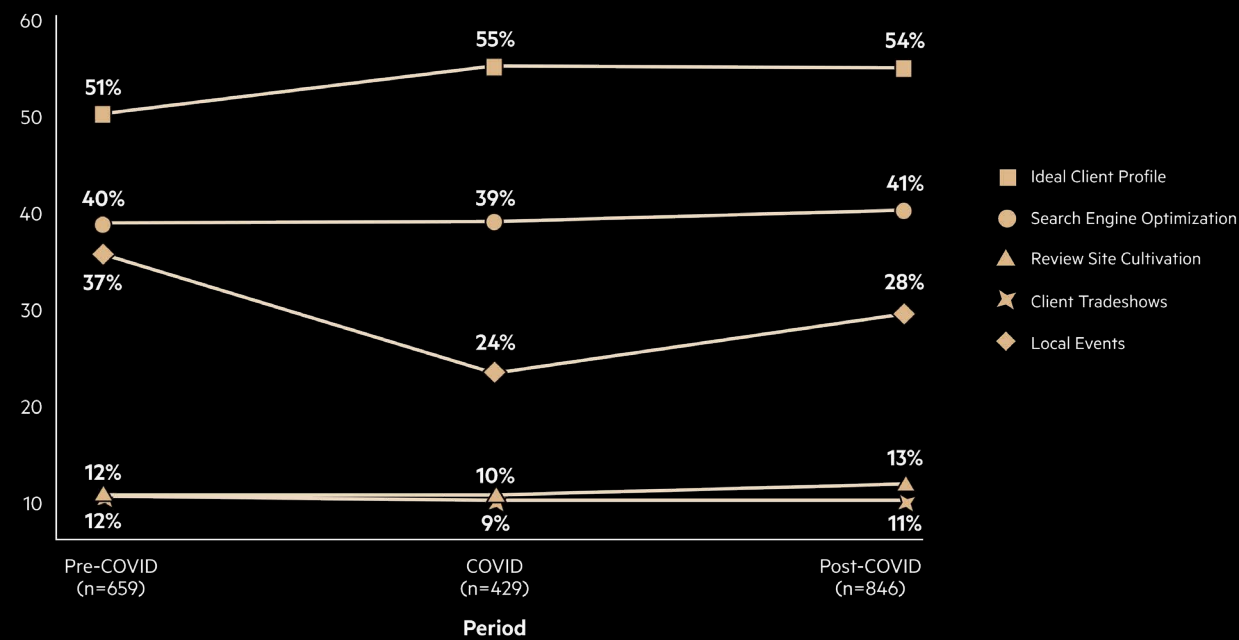
### Search Engine Optimization (SEO)

SEO was once an underused growth tool in the accounting industry, with most firms leaning on traditional referrals or local networking for visibility. The pandemic highlighted the need for digital discoverability, prompting firms to adopt SEO to secure consistent online visibility and client acquisition. Today, firms view SEO as increasingly important for reaching specific niches and geographic areas, helping attract clients aligned with their ICPs. With strategic SEO, firms stay competitive by driving high-quality traffic and connecting with clients actively seeking specialized accounting services.

### Online Review Sites

Before COVID, online reviews played a secondary role in growth compared to trade shows and in-person events. Despite in-person interactions halting during the pandemic, strategies involving review sites dropped by 16%. This reflects firms reducing investment into growth strategies as they prepared for the unknown and diverted resources to other priorities. Today, firms understand that client reviews are powerful trust signals—essential for attracting high-value clients aligned with their ICPs. Positive reviews not only build credibility but also boost search visibility, guiding clients toward informed choices and making review sites a vital component of a focused growth strategy.

Changes from Pre- to Post-COVID for  
Growth Competencies



	Changes in Growth Tools and Tactics from Pre- to Post-COVID									
	Target Market Selection (Niches)	Ideal Client Profiles (Personas)	Website Revamps	SEO	Content & Social Media Marketing	Review Sites (e.g Yelp)	Newsletters	Client Tradeshows	Local Events	Cold Calling
Pre-COVID (2018-2019)	45%	50%	64%	39%	49%	12%	49%	12%	36%	8%
During COVID (2020-2021)	42%	55%	66%	39%	46%	10%	44%	9%	24%	6%
Post-COVID (2022-2023)	45%	55%	62%	42%	49%	13%	45%	10%	27%	7%
Increase from pre- to post-COVID	0%	10%	-3%	8%	0%	8%	-8%	-17%	-25%	-12%

## STRATEGY PILLAR

# Firms are Prioritizing Strategies that Engage and Retain Clients

Client retention has never been more important as accounting teams work hard to meet increasing client demands and offer more value, all while operating with fewer resources. As a result, the number of firms measuring client health metrics increased from pre- to post-COVID. This demonstrates the importance of maintaining and growing existing client relationships in order to efficiently increase profits.

**The largest increases within the Strategy Pillar are:**

### Email Response Time

Email response time was not a high priority pre-COVID. With the shift to remote communication during the pandemic, prompt email response times became essential for client satisfaction and retention. This focus has only intensified post-COVID, with an 80% increase in its priority from pre-COVID to now. Firms recognize that quick responses build trust, resolve issues promptly, and enhance client experience—key factors in not just client retention but maximizing share of wallet from each client.

### Net Promoter Score (NPS)

Net Promoter Score (NPS) was a valuable yet under-prioritized metric pre-COVID. The pandemic brought a renewed focus on client satisfaction, driving a 57% increase in its importance from pre-COVID to now. Firms today prioritize NPS as a gauge of client loyalty and the likelihood of referrals. High NPS scores indicate satisfied clients who are more likely to recommend the firm, supporting retention and acquisition.

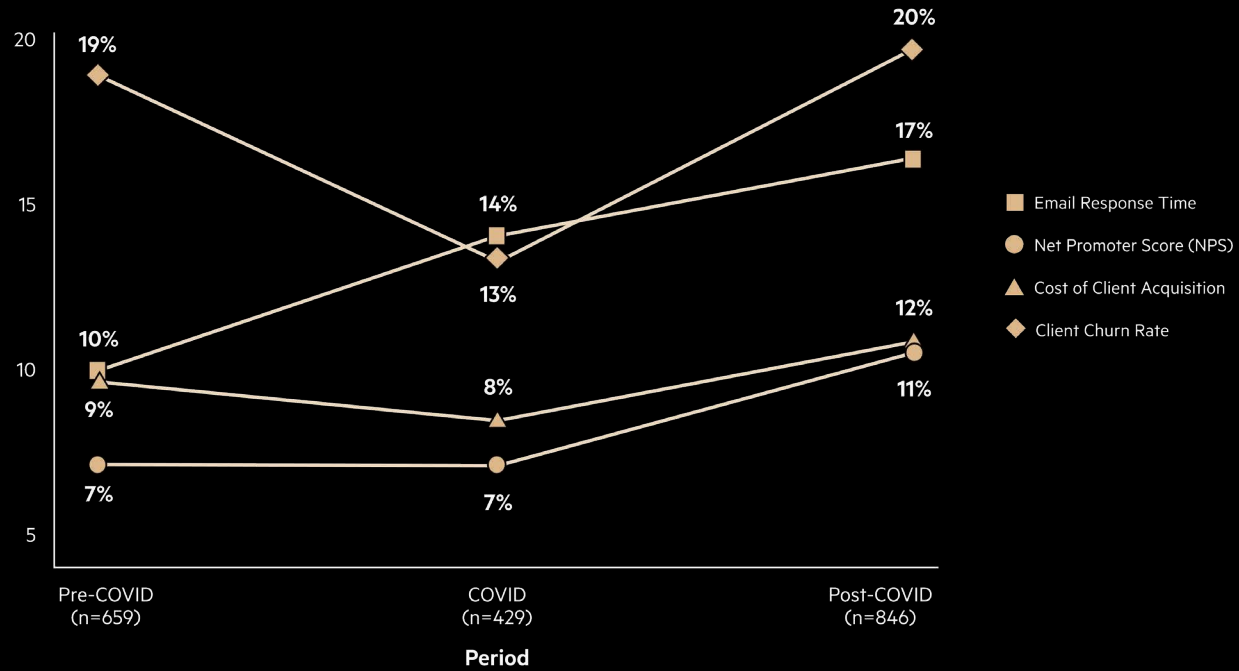
### Customer Acquisition Cost (CAC)

Before COVID, Customer Acquisition Cost (CAC) was typically viewed as a baseline business metric. CAC has risen in importance by 20% as firms have become more selective in client acquisition. Firm leaders are now measuring CAC to balance growth expenses against the profitability of new, high-value clients. By understanding and optimizing CAC, they can focus on acquiring clients who offer better returns on investment, aligning growth efforts with efficiency and profitability in a more selective, client-focused approach.

### Client Churn Rate

Client churn rate had been historically monitored but not heavily emphasized. COVID underscored the importance of maintaining existing relationships, leading to an 11% increase in its priority post-pandemic. Firm leaders now focus on reducing churn as a core part of profitability and stability. Retaining clients not only lowers acquisition costs but also provides opportunities to increase revenue by expanding services within existing relationships.

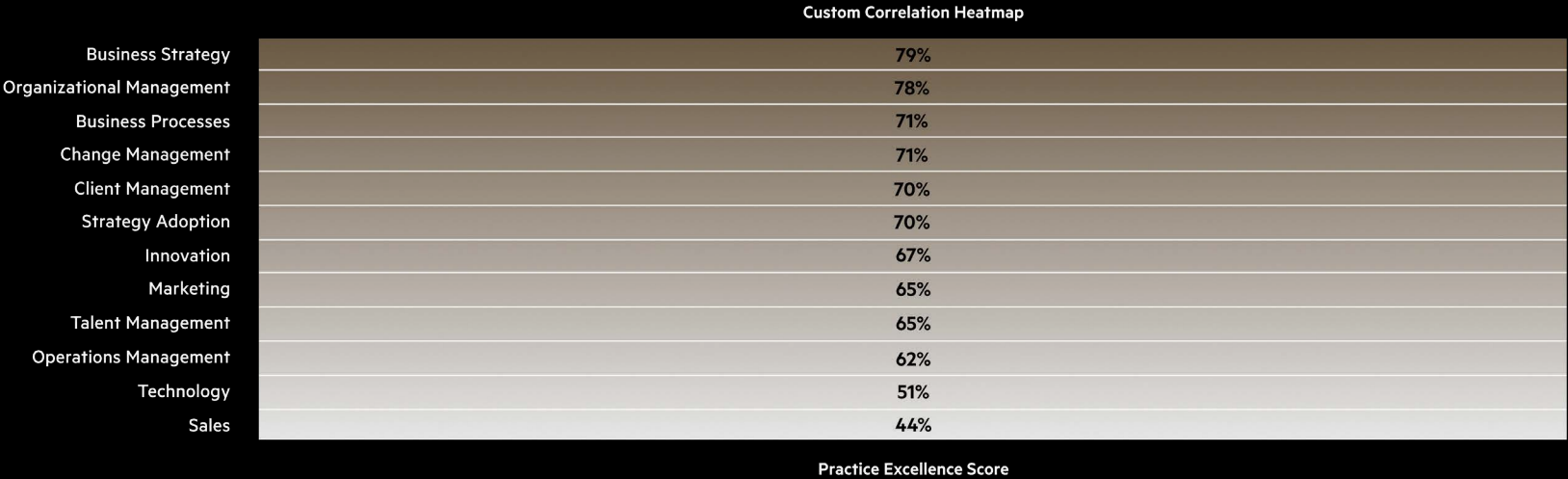
Changes from Pre- to Post-COVID for  
Strategy Competencies



	Changes in Strategy Tools and Tactics from Pre- to Post-COVID									
	Monthly Recurring Revenue (MRR)	Client Churn Rate	Average Revenue per Client	Cost of Client Acquisition (CAC)	Payback Period	Client Lifetime Value (CLV)	Accounting as a Service Magic Number	Jobs Completed by Staff	Email Response Time	Net Promoter Score (NPS)
Pre-COVID (2018-2019)	68%	18%	48%	10%	5%	12%	3%	43%	10%	7%
During COVID (2020-2021)	66%	13%	50%	8%	5%	10%	4%	45%	14%	7%
Post-COVID (2022-2023)	66%	20%	50%	12%	4%	13%	5%	45%	18%	11%
Increase from pre- to post-COVID	-3%	11%	4%	20%	-20%	8%	67%	5%	80%	57%

# The Key Competencies that Differentiate High-Performing Firms

Correlation Breakdown between PE Competencies and Overall PE Score



There have been sustained new heights over recent years for several Practice Excellence competencies. While this is the ideal outcome, there is no time to rest. Firm leaders must prioritize continuous improvement across all areas. Certain competencies, however, have a more direct impact on advancing overall Practice Excellence, making them strategic focal points for ongoing development.

For example, the Business Processes competency yields a 71% correlation with Practice Excellence Score and tends to be indicative of a firm's overall performance. This is clear when comparing leading firms with others. Leading firms (those in the fourth Practice Excellence quartile) typically score 24% higher in Business Processes than Expanding firms (those in the third quartile). Beyond Business Processes, other competencies—such as Marketing, Client Management, and Organizational Management—also set Leading firms apart. It's important to recognize these as correlations, not causations. While marketing activities alone won't move a firm from Expanding to Leading, firms poised to lead may often have the resources to market more effectively.

Prioritizing Client Management, Organizational Management, Business Processes, and Business Strategy likely offers the most direct route to firm-wide improvement. Meanwhile, competencies like Technology, despite showing lower correlation with Practice Excellence, remain crucial. Technology's universal importance across all quartiles gives it less of a linear relationship with Practice Excellence, as it's valued by all groups regardless of their stage.

These correlation values should be viewed as a representation of which competencies most distinguish high performing firms from lower performing firms. It's important to note that these relationships are firmly held regardless of COVID.

## How Technology, Automation, and AI are Boosting Efficiencies for Firms

Technology and AI have revolutionized how accounting firms operate, particularly when it comes to being more efficient.

The pandemic accelerated the adoption of new tools, like practice management software and communication tools, many of which have become permanent fixtures within firms. Cloud technology, while already common pre-pandemic, saw additional, if incremental, adoption, underscoring the demand for flexible, scalable solutions among firms that previously lagged in tech adoption.

Automation continues to streamline operations, saving time, and improving overall operational efficiency. And AI is increasingly being used to automate time-consuming tasks, including communication and research, enabling accounting professionals to place their focus on high-value work.

# Navigating the Road Ahead

As accounting firms navigate a post-pandemic world marked by rapid technological advancements and evolving client demands, one thing is clear: prioritizing efficiency and strategic management is key to sustaining growth and maintaining a competitive advantage. High-performing firms exemplify this, demonstrating that consistent improvements in Business Processes, Client Management, and Organizational Management can elevate Practice Excellence.

To continue evolving, firm leaders should focus on a few core areas:

- 1. Embrace continuous improvement:** Operational efficiency is not a one-time achievement; it requires ongoing evaluation and refinement. Regular assessments through frameworks like Practice Excellence can help firms track progress and identify new areas for optimization. Even if you have previously done so, take the [free Practice Excellence Assessment](#) today to understand your firm's current business proficiency score.
- 2. Invest in technology and AI:** Automation and digital tools are no longer optional. In fact, accounting professionals are recognizing that AI is core to modern business strategy, with [66%](#) agreeing that AI can serve as a competitive advantage. As AI capabilities expand, firms that effectively integrate [AI accounting technologies](#) will be the ones that enhance productivity, attract and retain talent, and scale effectively.

- 3. Prioritize client retention and expansion:** Retaining and expanding services with existing clients provides greater stability and growth potential than new client acquisition alone. Focusing on high-value clients and bundling services can help you optimize limited resources and deliver increased value to your clients.
- 4. Adapt management practices for talent retention:** As remote work continues and the talent shortage persists, firms should be intentional about management strategies that support employee development and engagement. At a minimum, implementing initiatives like standardized onboarding and performance reviews can engage team members, strengthen your team, and enhance firm-wide productivity.

The path forward for accounting firms is both challenging and promising. By committing to these strategies, firms can not only weather industry shifts but thrive within them—positioning themselves as leaders in the Efficiency Era.

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## Disclaimer

This report is based on data collected from a Karbon survey of volunteer responses. The individuals who choose to respond may not always represent the broader population, though we assume they're representative enough to derive meaningful conclusions about the state of the accounting industry. The only exception is firms with above 100 employees. Data was limited for this group and for that reason, the ability to report on these firms was also limited.

None of the relationships described in this survey are represented or implied to be a cause-and-effect relationship. Without a controlled environment, it's difficult—if not impossible—to make such statements. It can, however, be said definitively that certain high-performing firms tend to engage in specific activities or allocate their resources into specific categories to a statistically significant degree—not necessarily causation, but certainly correlation.

Readers are encouraged to interpret these results as a starting point for further exploration rather than conclusive evidence.



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