



Seamless Process Integration

Where the Firm of Tomorrow **Invests**

A Key Investment for the Firm of Tomorrow

In Kingland's framework, [The Firm of Tomorrow](#), we list **Seamless Process Integration** as one of five key investment areas essential for public accounting firms to achieve the target outcomes that successful firms in the next three to five years will exemplify. This focused paper dives deeper into the current state problems of unintegrated systems as well as the benefits of integrating. By automating data flows and eliminating duplicate entry, firms can reduce administrative burdens, automate controls, improve data quality, and free professionals to focus on high-value client work.

What does success look like for seamless process integration? Business processes have no offramps professionals must take in order to complete their tasks. Data is served to each professional when and where it is needed to complete each process.

Why Invest in Process Integration?

Firms should pursue seamless process integration to eliminate the inefficiencies of fragmented workflows and improve the client experience they provide. For example, in many public accounting firms' conflict checking processes, data originates in tools unique to each member firm, is cross referenced by risk and independence teams in other systems, and triggers email notifications to many professionals to understand if a conflict exists. Clients that will involve multiple member firms will often involve entirely separate processes to manage the global conflict check, requiring professionals to use both local and global tooling to complete the check. As the clients' relationships develop, this fragmented process will result in duplicated data across the local and global tools where the two systems may disagree on facts, requiring additional time to sift through the latest information and reconcile the outdated information.



Follow the QR code to read
The Firm of Tomorrow

As a second example in service delivery, many public accounting firms manage engagement onboarding and client data collection through a patchwork of disconnected systems and manual steps. Client information is often first captured through email, spreadsheets, or local intake forms, then re-entered into separate systems for engagement setup, billing, document management, and resource scheduling. When an engagement involves multiple member firms or service lines, each team may collect overlapping information again using its own tools or templates. This leads to duplicated effort, inconsistent client records, and delays before work can begin. Seamless process integration would allow client and engagement data to be captured once and automatically flow into downstream systems such as engagement management, billing, document repositories, and staffing tools. This reduces administrative overhead for professionals, minimizes data inconsistencies, and enables firms to start delivering services to clients more quickly and efficiently.

The outcome is extended timelines, repeated data entry by individuals lacking global context, and elevated risk of inaccuracy from human error. Investing in process integration will invert these outcomes, saving resources and enabling firms to win business more quickly.

The Hidden Cost of Process Fragmentation

Leading public accounting firms manage hundreds of processes, each an entry point for data to be contributed into their technology ecosystem. Focusing on just the client onboarding process, Kingland has worked with firms that require over a dozen systems to manage all the interwoven processes including acceptance, conflicts, independence assessment, business relationship management, and services authorization. Without seamless integration across systems participating in a single business process like this, these tools operate in silos, leading to:

- Repeated data entry for client details, engagement terms, and client affiliate structures across multiple systems.
- Manual reconciliation to verify data integrity and confirm data quality.
- Longer wait times for clients to start receiving firms' services, creating a competitive disadvantage for those firms with especially fragmented process.

These issues inflate cost, erode data quality, and create friction for clients that increasingly demand faster service delivery. System integration, when done in service of integrating business process, transforms these pain points into sources of advantage.

Consistent with any technology transformation, firms must examine the process, map process controls, and set goals to mark success. In this paper, we inspect the value of integrated business process, identify challenges of not integrating, and provide approaches to integrated processes.



Process Engineering

Orchestrating People, Systems, and Data

In order to know which technical integrations need to be in place to make positive change for the firm, business process needs to be efficiently designed first.

The Firm of Tomorrow designs the end-to-end process first with clear ownership, straight-through processing, defined hand-offs, and built-in controls. Once the right process is determined, the firm selects the right technology to drive that process.

Example: Global Conflict Checking

Current state

Within many networks today, separate systems and processes exist for conflict checking between member firms and the global network. In some cases, each member firm is responsible for its own conflict checking creating dozens of individual processes, and in others, there are standardized local and global processes. Still, there is fragmentation in the process that contributes to the costs, referenced earlier, to the firm. Each conflict checking process executed in the member firms and at the network level represents an off-ramp for the complete process where data quality can be impacted, data duplication could be introduced, and additional time needs to be taken. Seamless process integration means removing those off-ramps and developing a single process

Future State

The Firm of Tomorrow is still tasked with executing on its conflict checking process across local member firms' clients and multi-firm or global clients. However, the express lane has been put in place to drive efficiency and maintain data quality. What this means in practice is engineering the process around a dynamic, data driven, and flexible process supported by a tool that can handle each potential conflict checking scenario seamlessly, removing the need to develop unique systems to support different scenarios. With such a tool supporting the process, all conflict checking processes can begin the same way and the facts and circumstances of the conflict check (e.g. client location, relationships, risk, planned services) will automatically involve the right people from the right firms at the right time, all while referencing a common data store to ensure there is no disagreement on the facts.

In the integrated process, data quality controls are required once at the point of entry. All downstream systems inherit clean, validated data. The Firm of Tomorrow no longer duplicates data quality validation logic in every application and benefits from the corresponding cost savings.

Systemize Controls

Automating Quality Assurance

Quality assurance is a cornerstone of risk management and in meeting regulatory obligations for public accounting firms. Often today, teams manually verify and document data movements, such as confirming that client acceptance approvals were received from the right individuals, responding to conflicts via email, or engagement terms being copy and pasted from origination to downstream processes.

Where professionals are trusted to enter data into one system from another, integrated systems can step in with embedded controls to ensure data travels reliably from point A to point B:

- Critical data movements between systems are logged with metadata, including timestamps, user IDs, and change histories, creating immutable audit trails.
- Error that would have been introduced from people re-keying data into secondary systems is eliminated, enabling the firm to maintain data quality.
- Firms can be confident that systems are depended on to meet their process controls and not question that professionals may miss meeting controls in each instance.

This approach aligns directly with developing regulatory expectations for continuous monitoring and demonstrable controls.



In the financial services industry, regulatory pressure around controls automation has different rigour than in the profession. As public accounting regulators increase focus on the system of quality management and thus controls, Kingland has the expertise and technology in developing Quality Assurance Transaction Testing (QATT) within organizations. See our article on the topic here:

[QATT: The Cornerstone of Trust](#)

Process Goal

Enter Data Once, Leverage Everywhere

A challenge of a fragmented process is the re-keying of data, or “swivel chair” operations, where professionals take data from one place and manually re-enter that data, with or without updates, multiple times. These behaviors introduce duplication, may introduce error, extend the time required to complete, and can undermine data integrity.

Business processes supported by wholly integrated systems solve these issues by ensuring data is captured once with applied data quality controls and then reused across the firm. Two practical paths enable this outcome, tailored to a firm’s technology maturity - or appetite for transformation:

Path A: Single Point of Entry

In this model, a single interface serves as the authoritative point of entry for all client and engagement data into a single database. Entry occurs upfront during client onboarding, client affiliate verification, or engagement approval, with APIs pushing validated records to consuming systems, and professionals experience a unified user experience. No duplication, no re-keying. While this path may be ideal, it is a high bar to meet to move from most firms’ current states where data is entered into many systems that are business critical. The work to consolidate becomes a challenge given the multiple processes involved, and the different lifespans of the underlying systems that would be consolidated, which pushes firms to look at path B

Path B: Single Point of Aggregation

A single aggregation layer, integrated across each possible point of data entry or data use, achieves the goal of entering data once and leveraging everywhere. The work of integration will be more complicated, as each potential point of entry will need to reference the aggregation layer to ensure what is being entered is truly new data. However, this path enables firms to maintain their current systems. The aggregation layer ingests updates from any entry point and synchronizes them enterprise-wide in real time. Path B can also be used as an to start a gradual transition to fully integrated systems, while providing immediate benefits

Both paths foster the efficiency and agility needed to address the pressures firms face today, and makes major strides in turning data into a strategic asset rather than a liability.

Conclusion

Seamless process integration is the linchpin for the Firm of Tomorrow, directly advancing towards the target outcomes of enhancing process efficiencies, reducing time to market, increasing quality, and improving the professional's experience navigating each process. By automating quality assurance transaction testing and increasing data reuse, firms boost productivity, mitigate regulatory pressures, and deliver the high-quality, rapid response services clients expect.

The path forward starts with assessing your most critical data handoffs. Kingland's expertise in building aggregation layers and tools like Client Tree Hub positions us to partner on your transformation.

Email us at **outreach@kingland.com**, reach out to us individually, or connect with a Kingland expert on our website to start your integration transformation.



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