

How Internal Innovation and Platform Integration Transformed a Growing Accounting Firm

Summary: Templeton Advisors, an 80-employee accounting firm in Florida, struggled with disconnected practice management systems that couldn't provide real-time data or accountability. After years of development, they launched PracticePro 365 in 2019, a fully integrated practice management solution built on Microsoft Dynamics that transformed their operations. The result: double-digit annual revenue growth, recognition as a "Best of the Best" firm for three consecutive years, reduced operational complexity, and a scalable platform that positioned them as industry innovators.

When off-the-shelf solutions fall short, building the right system can turn operational frustration into competitive advantage.

In 1990, Templeton Advisors was founded in West Palm, Florida. As the firm grew and expanded in complexity, leadership faced a critical challenge: no practice management solution on the market could deliver real-time visibility, accurate decision-making data, or true accountability for partners and project managers.

Despite trying various approaches, the firm remained stuck with fragmented systems that couldn't keep pace with their ambitions. Leadership knew they needed something better—not just an upgrade, but a fundamental transformation.

Key Outcomes

- Double-digit annual revenue growth
- "Best of the Best" recognition for three consecutive years by Inside Public Accounting
- Reduced tech stack and operational complexity
- Enhanced accountability with real-time financial data and KPIs
- Industry recognition as an innovator and leader

The Challenge: Fragmented Systems and Limited Visibility

For years, Templeton Advisors relied on a patchwork approach to practice management. Time and project data were captured in a Microsoft Access database, then periodically transferred into Microsoft SL's project accounting system for billing and recordkeeping.

Leadership and staff struggled with systems that weren't current in real time. Decision-makers lacked accurate information when they needed it most. Partners and project managers couldn't be held properly accountable because the data simply wasn't there.

As the firm continued to grow, these limitations became increasingly unsustainable. Every department felt the impact of disconnected systems and delayed information. Leadership knew that to scale effectively, they needed a practice management solution that simply didn't exist in the marketplace.

The Turning Point: Vision Meets Innovation

After recognizing that no existing solution could meet their needs, leadership made a bold decision: develop an integrated platform that would eliminate system fragmentation and deliver the real-time visibility and accountability the firm required.

The vision was clear—build on top of their existing Microsoft Dynamics CRM system to create a fully integrated practice management solution. This approach would reduce the number of systems needed to run the business, eliminate brittle system connections, and leverage the Microsoft Power Platform for future scalability.

The goal wasn't just to solve today's problems. It was to create a foundation that could grow with the firm for decades to come.

The Solution: Years of Development, One Powerful Platform

PracticePro 365 wasn't built overnight. Templeton Advisors spent over a decade designing, developing, and refining the solution, serving as both architect and testing partner. The result was a sophisticated platform that makes complex practice management surprisingly simple.

The comprehensive implementation delivered transformational capabilities across operations:

- Fully integrated practice management built on Microsoft Dynamics platform
- Real-time data visibility for accurate business decisions and accountability

- Unified tech stack eliminating multiple disconnected systems
- Cloud-based security through Microsoft infrastructure, with no on-premise servers
- Dynamic financial reporting and KPIs accessible across all levels
- Professional service automation (PSA) combined with complete practice management functionality
- This end-to-end managed solution unified practice management on Microsoft Dynamics, driving double-digit revenue growth, reducing operational complexity, and creating a scalable foundation for long-term profitability.

The Results: Recognition, Growth, and Industry Leadership

The impact extended far beyond operational improvements:

Metric	Before	After	Improvement
Annual Revenue Growth	Moderate	Double-digit organic growth	✓
Industry Recognition	–	"Best of the Best" 3 years running	✓
System Complexity	Multiple disconnected platforms	Single integrated solution	✓
Real-Time Visibility	Limited/delayed	Complete and current	✓
Operational Efficiency	Manual processes, high overhead	Streamlined workflows, contained costs	✓

Leadership gained the real-time accountability and decision-making tools they'd been seeking. Staff benefited from streamlined workflows and reduced administrative burden. The entire firm earned recognition as an innovator and industry leader.

The Lesson: Strategic Innovation Delivers Lasting Competitive Advantage

Most accounting firms accept the limitations of available practice management solutions. Forward-thinking leaders recognize that the right technology platform can become a defining competitive advantage.

Templeton Advisors didn't just need better software—they needed a system that could evolve with their vision, provide unprecedented visibility, and position them as industry innovators. They invested over a decade to build it.

That's what Practice Pro 365 delivered.

This complete practice management transformation reduced complexity, delivered real-time visibility and accountability, and fueled sustained growth—earning "Best of the Best" recognition three years in a row and establishing the firm as an industry innovator. Most importantly, they built a platform that can expand and scale to meet future needs, ensuring that today's innovation becomes tomorrow's continued success



PracticePro 365 is the backbone of our firm and the key to helping drive our growth and profitability."

— Leadership, Templeton Advisors

About PracticePro 365

Built from real-world accounting firm experience, PracticePro 365 simplifies practice management with a fully integrated, Microsoft-native platform.

- ✓ Complete practice management and professional service automation
- ✓ Built on Microsoft Dynamics with Power Platform for scalability
- ✓ Real-time financial reporting and interactive dashboards
- ✓ Cloud-based security and reduced infrastructure overhead

Our mission is to eliminate system complexity and empower accounting firms to operate at their full potential. With PracticePro 365, you gain real-time visibility and control—helping your firm not just keep up, but lead. [Contact us today.](#)