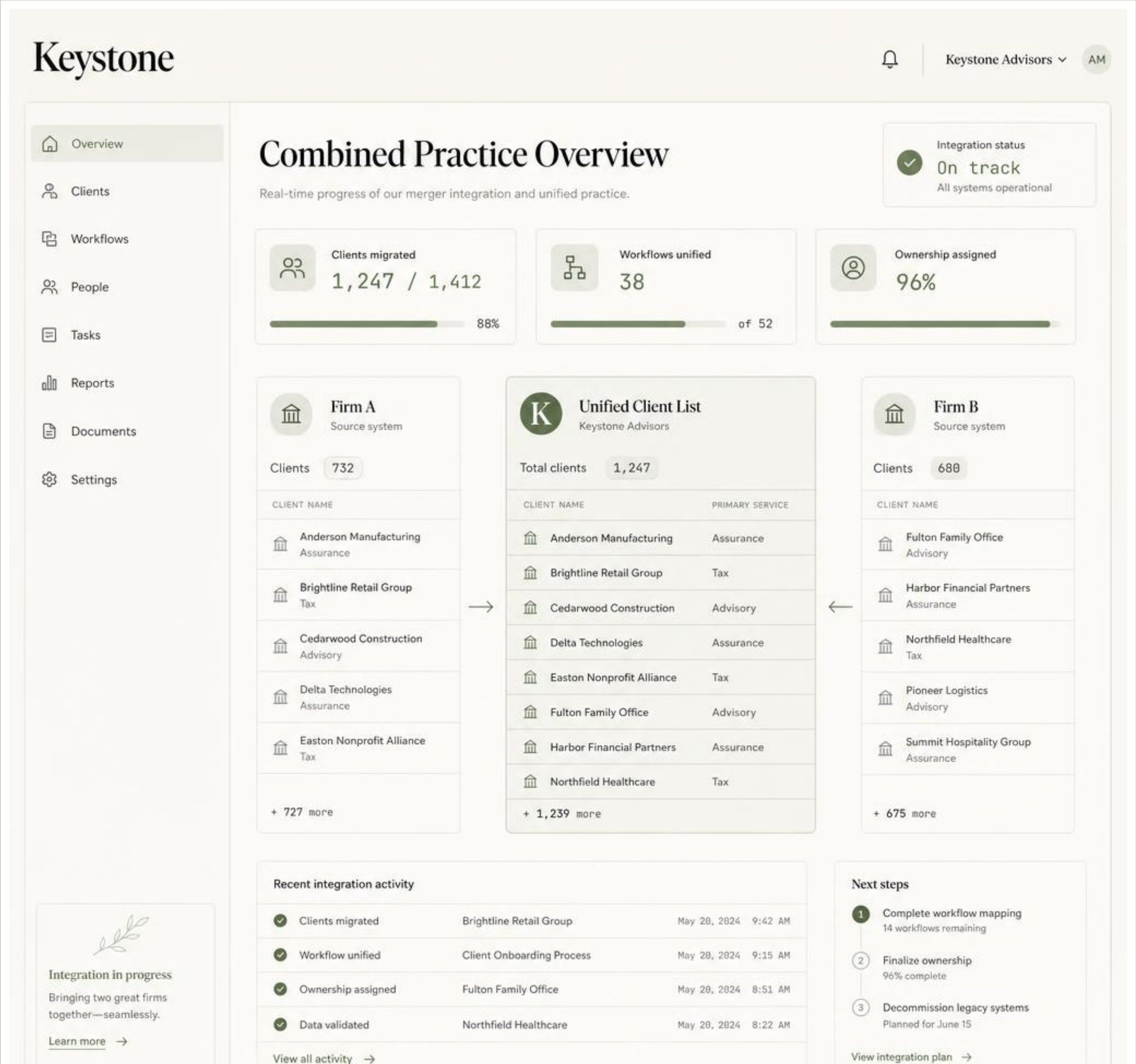
CASE STUDY · KEYSTONE

One firm, one spine - merging two practices into a single operational system.

Accounting / Professional Services

INDUSTRY	ROLE	YEAR	CODENAME
Accounting / Professional Services	Product lead & integration architect	2024	Keystone



THE PROBLEM

What the team was up against

01 Two firms merged overnight but carried two of everything - practice systems, client lists, engagement workflows, file conventions, partner assignments - with no reconciled source of truth.

02 Client ownership was ambiguous during the transition: overlapping accounts, orphaned relationships, and duplicate outreach eroded trust with the most valuable clients.

03 Each legacy firm ran engagements to its own rhythm, so quality reviews, deliverables, and billing cadences drifted branch to branch and post-close synergies were invisible.

THE SOLUTION

How the platform answers it

01 A reconciliation layer that ingests both legacy practice systems, deduplicates clients, and assigns a single owner per account with a documented handoff trail.

02 A unified engagement workflow - Intake ? Scoping ? Prep ? Review ? Delivery - that collapses two legacy processes into one standardised path, with side-by-side visibility during transition.

03 A combined-practice overview for partners: migration progress, ownership assignment, workflow adoption, and legacy-system decommission plan tracked as one live plan of record.

IMPACT

2?1

Practice systems consolidated into a single spine

96%

Client accounts with an assigned post-merger owner

-54%

Engagement variance between former firms after unification

<90 days

From close to first fully unified engagement cycle

TECHNOLOGY

Frontend

- React
- TypeScript
- TanStack Query
- Tailwind

Backend

- Node.js
- PostgreSQL
- Row-level security
- Edge functions

AI

- Client deduplication
- Ownership suggestion
- Workflow mapping

Integrations

- Legacy practice systems
- Document storage
- Identity provider

FIG. 01

Unified intake with smart routing across legacy processes

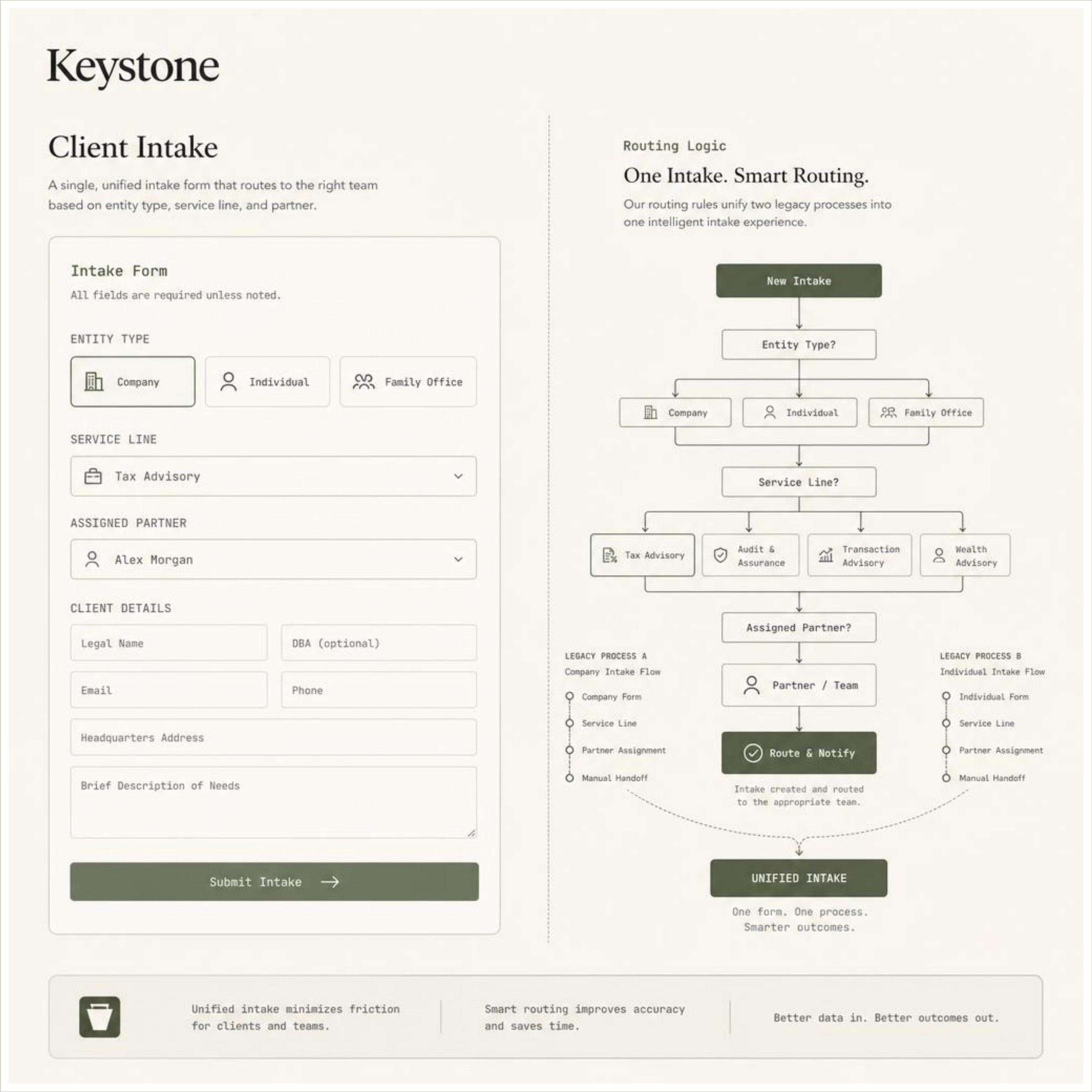


FIG. 02

Client ownership matrix tracking post-merger handoffs

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Client Ownership Matrix

Overview of client account ownership transitions and handoff status.

CLIENT	LEGACY FIRM	NEW OWNER	HANDOFF STATUS
Atlas Capital Partners	Baldwin & Co.	Sarah Mitchell	Complete
Northwood Family Office	Heritage Advisors	James Thornton	Complete
Summit Ridge Holdings	Pioneer Wealth	Emily Carter	Complete
Redwood Management LLC	Baldwin & Co.	Daniel Lee	In Transition
Clearview Capital	Heritage Advisors	Michael Chen	In Transition
Silverline Ventures	Pioneer Wealth	Jessica Patel	In Transition
Greenwich Lane Partners	Baldwin & Co.	Olivia Reynolds	Pending
Hawthorne Family Trust	Heritage Advisors	Ethan Brooks	Pending
Meadowbrook Holdings	Pioneer Wealth	Ava Morgan	Pending
Stonebridge Advisors	Baldwin & Co.	Logan Pierce	Pending

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FIG. 03

Workflow orchestration collapsing two legacy processes into one