

Director of Operations & Technology (Accounting Firm)

Location: Flexible / Hybrid

Department: Firm Operations & Strategy

Reports to: Managing Partner or COO



About the role

We're seeking a strategic, tech-savvy operations leader to help transform how our firm delivers services, scales processes, and leverages technology. This is not a traditional IT role. It's a cross-functional position designed to bridge people, process, and platform.

As the Director of Operations & Technology, you'll lead firmwide initiatives to streamline workflows, consolidate systems, and drive measurable capacity gains. You'll work closely with partners, department heads, and external vendors to identify inefficiencies, implement solutions, and champion continuous improvement.

If you're passionate about optimizing how work gets done and know your way around accounting systems, automation tools, and change management, this role is built for you.

Key responsibilities

- **Technology strategy:** Evaluate the current tech stack and lead roadmap planning for systems consolidation, integration, and automation.
- **Process improvement:** Identify bottlenecks across departments and implement streamlined workflows to improve capacity and reduce manual effort.
- **Vendor management:** Own the selection, implementation, and performance tracking of key software.
- **Change enablement:** Drive adoption of new tools through clear communication, documentation, and training plans. Comfortable working closely with vendors to drive change management.
- **Cross-functional collaboration:** Partner and collaborate with IT, Finance, Tax, and Client Service teams to align systems and processes across the firm.
- **Measurement:** Define success metrics and report on the ROI of operational initiatives.

Ideal experience

- 5-10 years in operations, consulting, or technology management ideally within a professional services or accounting firm
- Experience evaluating and implementing modern tech (ERP, workflow automation, payment systems, etc.)
- Proven success in leading cross-functional transformation or process improvement initiatives
- Familiarity with practice management and accounting systems is a plus
- Comfortable working with firm leadership and influencing stakeholders at all levels

What you bring

- Strategic mindset with strong operational instincts
- Ability to balance big-picture thinking with executional detail
- Confidence in analyzing systems, workflows, and data to drive decisions
- Natural collaborator who can lead without authority
- Curiosity and resilience and willing to test, iterate, and improve