



Harnessing technology and AI for efficiency and growth.

A 5-step playbook for tax firm leaders

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Today, tax, audit & accounting firms don't win by buying more tools — they win by aligning technology and AI to growth, modernizing their workflows, and upskilling their teams to deliver advisory services at scale.

To delve into this deeper, we present this 5-step roadmap for firms to follow that illustrates ways they can cut low-value work, elevate their clients' experiences, and turn compliance efficiency into profitable, year-round guidance.

Key takeaways:

Build a formal, growth-linked tech strategy —

Map end-to-end workflows, prioritize two or three high-impact fixes, and review the roadmap every six months.

Automate the repetitive to free capacity —

Integrate data sources, use AI-assisted prep and review, and standardize portals, e-signatures, and digital checklists.

Shift from compliance to advisory —

Leverage analytics and CRM cadence to identify client needs and possible services, and then retrain teams for proactive planning.

The ground under tax, audit & accounting firms is shifting — and fast. Client expectations are rising, compliance is accelerating, and technology, especially AI, is reshaping what *great service* looks like. For ambitious firm leaders, this isn't a threat, it's a runway to opportunity — and the winners will be those who harness technology and AI with intent, align it to growth, and build a culture that can adapt and scale.

Drawing on recent industry insights from the Thomson Reuters Institute — such as *the 2025 State of Tax Professionals Report*¹ and a recent conversation with Allan Stahl, Director of Strategic Technology at Thomson Reuters² — this focused, high-impact, 5-step playbook can help firms move from incremental upgrades to transformative results.

¹ *The 2025 State of Tax Professionals Report*, Thomson Reuters Institute (May 14, 2025); available here: <https://www.thomsonreuters.com/en-us/posts/tax-and-accounting/2025-state-of-tax-professionals-report>.

² *How are tax firms harnessing technology to gain efficiency and growth?* A Thomson Reuters Institute Clarity Podcast (Episode 2:8; June 25, 2025); available here: <https://www.youtube.com/watch?v=4YEEEXTMozEM>.

Step 1: Build a growth-centric technology strategy

Stop buying tools to plug leaks. Start building a system that powers your firm's growth. A formal technology strategy, tied to measurable business outcomes, is the difference between a scattered effort and scalable success.

What to do now:

- **Define growth and efficiency in concrete terms:** Do you want to increase client volume without adding headcount? Expand advisory revenue by 30%? Improve turnaround times by 40%? Clarity drives selection.
- **Map your end-to-end workflow:** From client intake to delivery, document the friction points, such as manual re-keying, data gaps, bottlenecks, and compliance choke points. This is your blueprint.
- **Prioritize two to three high-impact upgrades:** Attack the repetitive, error-prone steps first — those areas where hours are lost and risk is highest.
- **Create a living roadmap, and then review it every six months:** Measure what's working, retire what isn't, and reallocate budget toward those initiatives that move the needle.

Desired outcome: A deliberate architecture that aligns technology, people, and processes — so every new investment compounds, rather than complicates.

Step 2: Automate the repetitive, elevate the valuable

Your most expensive resource is human attention. Don't waste it on copy-paste, reconciliations, or hunting for documents. Automation and AI can eliminate low-value, repetitive work while improving accuracy and speed.

What to do now:

- **Automate data entry and reconciliation:** Use integrations to pull from banks, accounting systems, payroll providers, and client portals. Reduce touchpoints and thus reduce errors.
- **Use intelligent document management:** Auto-classify, tag, and route documents. Enable fast retrieval and secure sharing.
- **Deploy AI in prep and review:** Let AI pre-populate forms, flag anomalies, and locate missing details. Your team then can focus on judgment and high-stakes review.
- **Set automated reminders and workflows:** Trigger client requests, e-signature nudges, and internal handoffs so that nothing stalls.

Desired outcome: Hours returned to the team, faster cycle times, fewer corrections — and a foundation for scaling up without burning out your staff.

Step 3: Modernize workflow and client experience

Clients expect digital clarity, such as transparent status, secure sharing, quick approvals, and zero paper shuffle. Your team needs real-time visibility into capacity and deadlines: A modern workflow backbone delivers both.

What to do now:

- **Move to cloud-based workflow platforms:** Centralize tasks, deadlines, dependencies, and dashboards. Give partners a live view of progress and bottlenecks.
- **Use secure client portals:** One place for uploads, approvals, messages, and payments — make it clean, compliant, and convenient.
- **Standardize e-signatures and digital checklists:** Eliminate delays, while making it simple for clients to do the right thing quickly.
- **Analyze the data:** Track turnaround times, queue lengths, client response lag, and then rework rates. Use these metrics to continuously improve.

Desired outcome: Predictable delivery, fewer emergencies, and a client experience that feels premium — because it is.

Step 4: Upskill your team and lead a culture shift

Technology doesn't transform firms, people do. Tools only produce a return on investment when your team is capable, confident, and motivated to use them. Training and culture are the critical multipliers.

What to do now:

- **Make tech fluency a core competency:** Bake training into on-boarding, performance reviews, and career paths. Then, reward mastery.
- **Appoint tech champions:** Empower super-users to pilot tools, share best practices, and mentor peers. Turn curiosity into capability.
- **Encourage experimentation:** Run low-risk pilots and collect feedback. Iterate quickly and then normalize improvement and learning.
- **Incentivize adoption:** Recognize teams that use new tools to drive measurable gains in accuracy, turnaround, and client satisfaction.

Desired outcome: A firm that adapts quickly, extracts value from its stack, and recruits talent that wants to grow with the firm.

Step 5: Use AI to expand beyond compliance into advisory

Compliance work is being automated. That's not a threat — it's your opening. Use the time and insight unlocked by technology to deepen client relationships and grow higher-margin advisory services.

What to do now:

- **Turn data into insight:** Use analytics to identify cash flow trends, entity structuring opportunities, R&D credits, sales tax exposure, and planning gaps before the client asks.
- **Productize advisory:** Package services — such as quarterly planning, owner tax optimization, business restructuring, and audit defense readiness — so they're easy to buy and deliver consistently.
- **Automate the compliance core:** As prep time shrinks, retrain staff to lead planning sessions, scenario modeling, and proactive outreach.
- **Stay close with a CRM cadence:** Schedule check-ins, track life events and business milestones, and run targeted surveys to surface needs.

Desired outcome: Stickier relationships, diversified revenue, and a reputation as a strategic partner — not just a seasonal vendor.

Putting it all together: Lead the journey

Transformation isn't a one-time project, rather it's a leadership discipline. To that end, firm leaders should set the vision, choose a few high-leverage moves, and execute relentlessly. Use this five-step playbook to guide your next several quarters:

Quarter 1:

Map the workflow, choose the top two frictions, and stand up a cloud workflow platform with client portals.

Quarter 2:

Implement data automation and AI-assisted prep and review for core returns. Launch e-signatures and digital checklists.

Quarter 3:

Train tech champions. Roll out dashboard KPIs. Pilot one productized advisory service with 10 clients.

Quarter 4:

Review outcomes and double down on what works. Expand advisory services and refine client engagement using CRM insights.

This is the moment for bold, focused leadership. With a clear strategy, targeted automation, modern workflows, an upskilled team, and an advisory-first mindset, your tax, audit & accounting firm can do more than keep up — it can set the pace.

Remember, technology and AI aren't just tools in your stack, they're the engine of efficiency, the catalyst for growth, and the platform for the kind of client experience that wins — and keeps — great business.

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