QXecutive Roundtable

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QX ACCOUNTING SERVICES

Market Leaders in Outsourcing

WHERE TECHNOLOGY MEETS FIRM TRANSFORMATION

The QXecutive roundtable was an exclusive, invitation-only roundtable for leaders from the UK's Top 100 accounting firms. Set against panoramic views from The Shard, the session marked an exchange of honest perspectives and disruptive insights.

KEY TAKEAWAYS

Senior leaders across UK Top 100 firms are aligned on one thing: transformation is no longer optional. The intent is clear, but execution remains the biggest hurdle.

Based on the discussions during the session, here are the key themes shaping how firms are approaching AI, automation, and technology adoption today.

01 The Challenge Isn't Why. It's How.

There is strong buy-in at leadership level around AI and automation. However, most firms are struggling to move from intent to action.

The gap lies in **practical implementation** – where to start, what to prioritise, and how to deliver measurable outcomes.

02 Internal Capability Gaps Are Slowing Progress

Firms often lack the **internal skillsets, ownership, and capacity** required to drive transformation forward. Even when teams are open to change, there is no clear structure to:

- Lead initiatives
- Drive accountability
- Sustain momentum

03 Disconnected Systems Are Holding Firms Back

Many firms operate across multiple, siloed systems that don't integrate effectively. As a result:

- Automation can increase complexity instead of reducing it
- Manual work persists despite new tools
- Efficiency gains remain limited

04

Transformation Needs a Phased, Practical Approach

A full-scale overhaul feels too disruptive and high-risk for most firms.Instead, the most effective approach is:

- **Short-term, structured plans (e.g. 90 days)**
- Focus on **quick wins and incremental improvements**
- Fixing inefficiencies in existing workflows before layering new technology

This creates a stronger foundation for AI and automation to deliver real value.

WHAT THIS MEANS FOR FIRMS

Successful transformation isn't about adding more technology. It is about **simplifying processes, aligning systems, and taking a structured approach to change**.

Firms that get this right will be best positioned to scale efficiently and unlock the full potential of AI.

TURNING INTENT INTO EXECUTION: THE FIVE LEVERS OF TRANSFORMATION

The discussion highlighted a clear need for a more structured, execution-led approach to transformation.

At QX, we approach this through the Five Levers of Transformation – a framework designed to help firms drive meaningful progress without the disruption of large-scale overhauls.

The five levers focus on the areas where firms can unlock the most immediate and sustained impact:

- **Process Harmonisation** – Standardising workflows to eliminate inefficiencies and create consistency across the firm
- **Productivity Gains** – Improving utilisation and ensuring work is completed at the right level, by the right people
- **AI & Automation** – Introducing technology in a way that enhances, rather than complicates, existing operations
- **Strategic Offshoring** – Leveraging global talent to increase capacity, flexibility, and cost efficiency
- **Operating Model Redesign** – Aligning structure, roles, and delivery models to support scalable growth

When applied together, these levers enable firms to move from intent to action, delivering quick wins in the short term, while building a foundation for long-term, sustainable transformation.

EXPLORE WHAT THIS COULD LOOK LIKE FOR YOUR FIRM

If you'd like to discuss how this framework can translate into a practical roadmap for your firm, we'd be happy to continue the conversation.

Book a 1:1 discussion

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