The Tech-Enabled CPA Firms of 2026

Automation, Outsourcing & Operating Models

Insights for 2026 & beyond

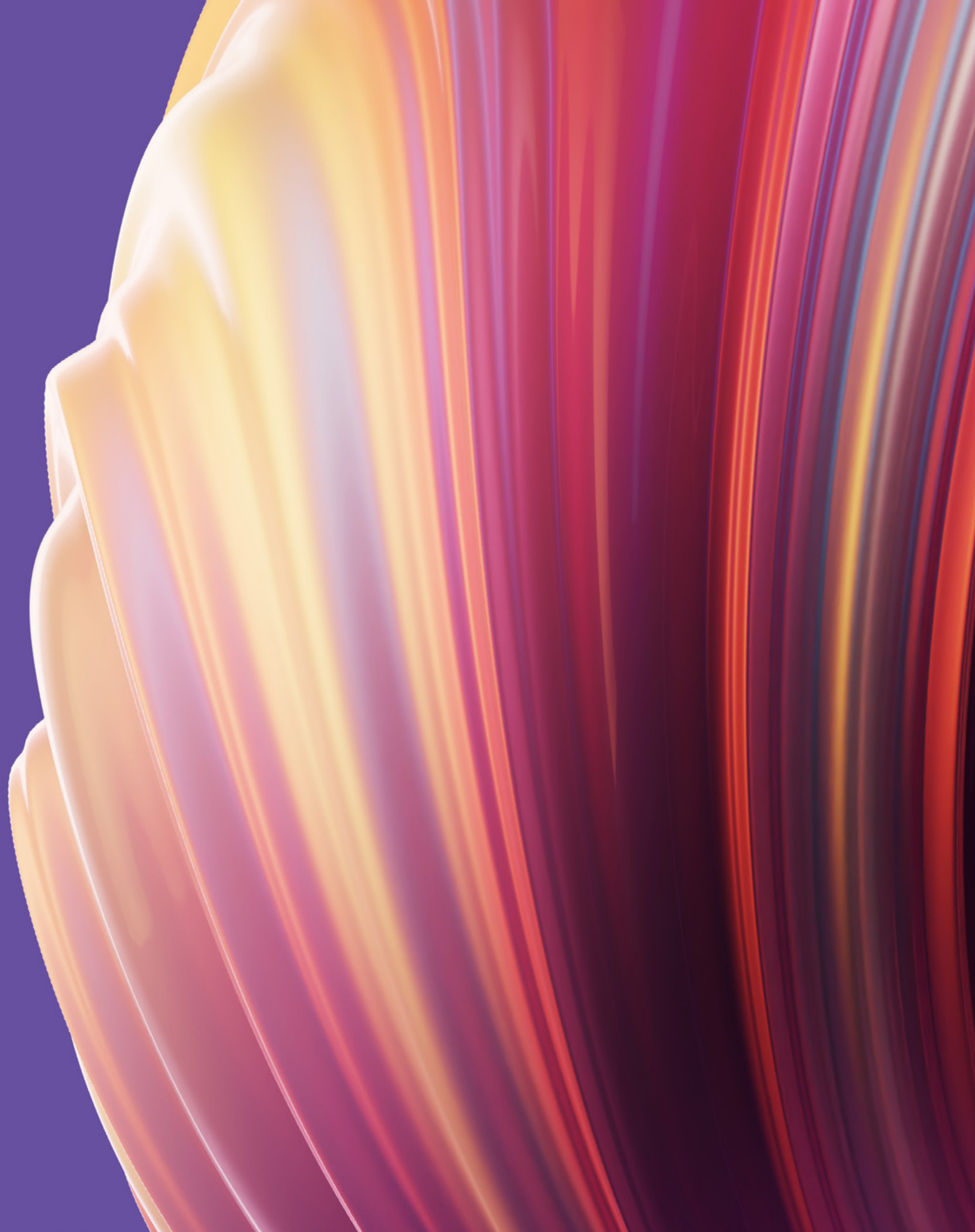
QX ACCOUNTING SERVICES

Market Leaders in Outsourcing

CPA firms are navigating a period defined by steady demand, rising complexity, and increasing pressure on delivery.

Workloads are expanding, client expectations are evolving, and access to experienced talent remains constrained. Technology adoption is becoming central to how firms respond, with outcomes shaped by the depth of integration and structure of execution.

This guide combines broader industry signals with observations from QX's engagement with the market, offering a practical view of where firm operations are heading.



Methodology

This guide brings together:

- Data from established industry sources, including AICPA, CPA.com, Intuit, Wolters Kluwer, and Thomson Reuters

- QX Insights, based on a structured review of conversations with 100 clients, prospects and peers across mid-market CPA firms

QX Insights are used selectively to validate broader trends and reflect how firms are responding to them in practice.

Automation Adoption

46%

of accountants use AI daily

95%

say technology reduces compliance time

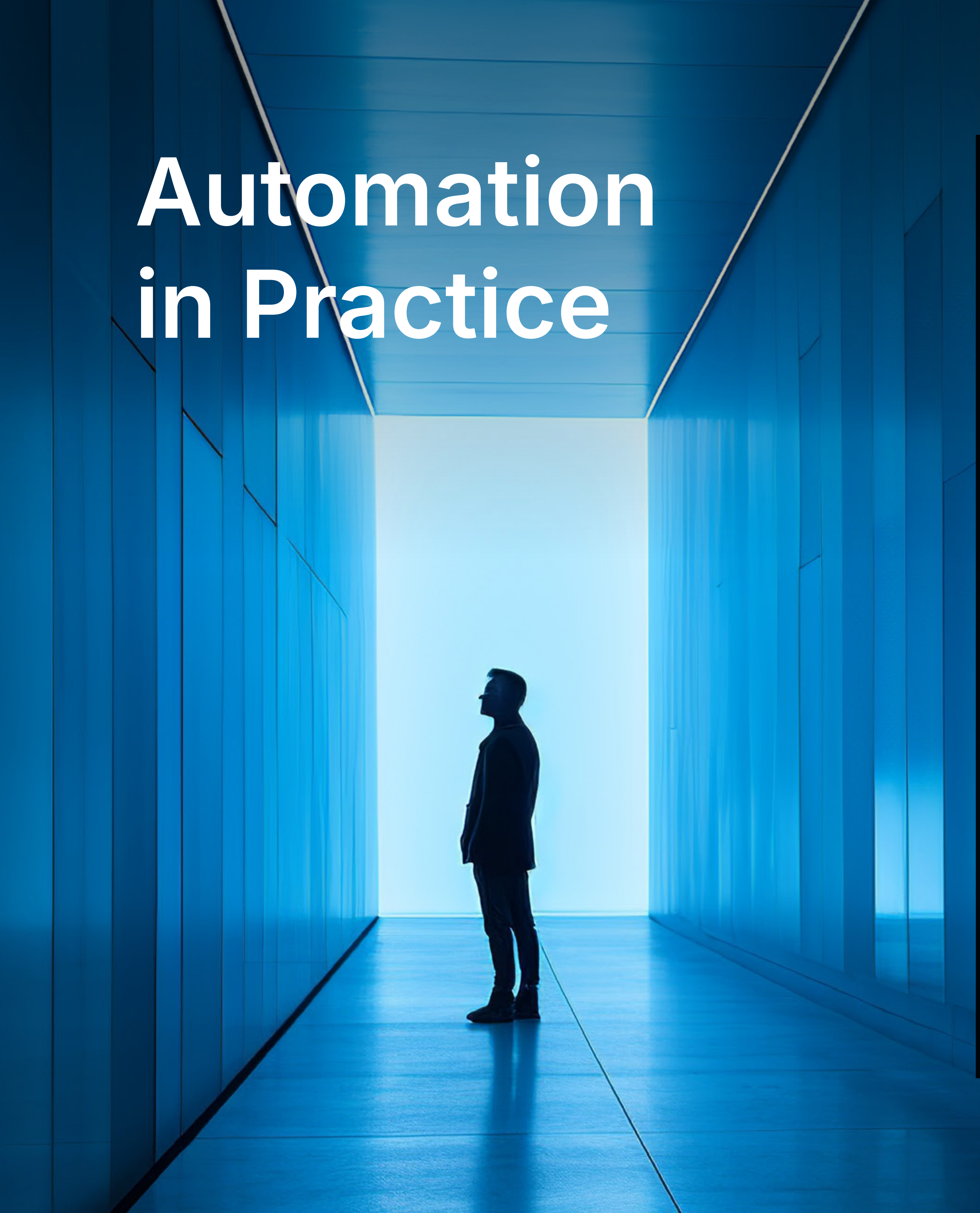
81%

report productivity improvements from AI

Automation has moved beyond experimentation. It is now embedded in daily firm operations, particularly across compliance-heavy processes where volume and repetition are highest.

The value firms are realizing depends less on how widely automation is adopted and more on how deeply it is integrated into workflows, review structures, and delivery models.

Automation in Practice



QX Insights:

- **52%**
  of firms we engaged with use AI or automation as part of daily workflows

- **74%**
  report measurable productivity gains since adopting automation

Adoption is now broad-based across firm sizes. The next phase of value will depend on how well automation is connected to delivery and review processes.

Adoption Depth

While automation usage is widespread, the depth of implementation varies significantly.

In most firms, automation is applied to specific tasks rather than complete workflows. Review, exception handling, and quality assurance remain largely people-led, which influences the overall capacity gain.

Key Action Point:
Consider where automation currently sits within your firm: at the task level, workflow level, or delivery level. And where deeper integration could unlock further capacity.

Explore where automation is delivering value across similar firms.

Connect with our experts

Technology Complexity

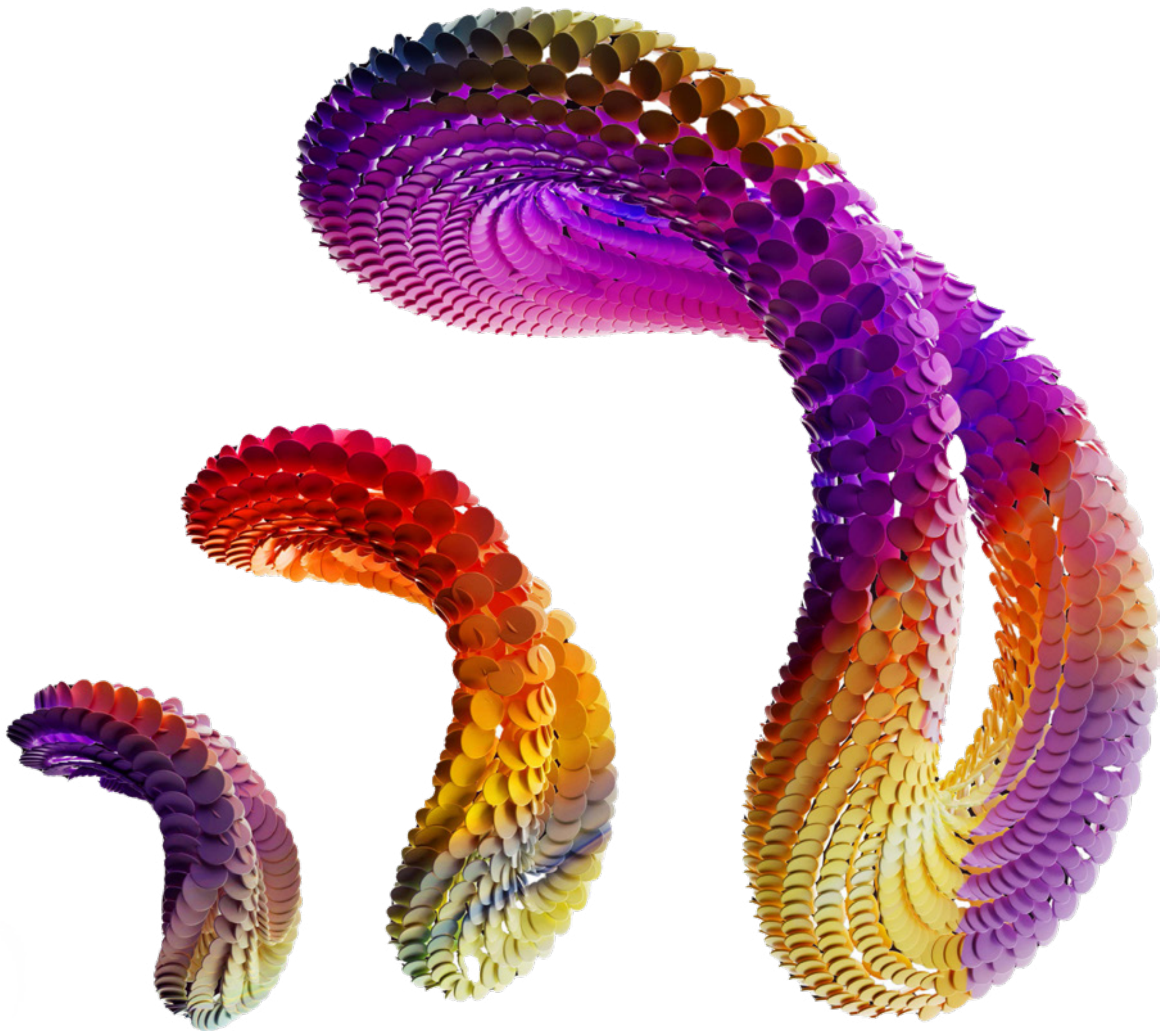
- Firms operate across an average of 8 digital tools

- **89%**

  say better integration is required for growth

Technology ecosystems are expanding, increasing the need for alignment across systems and teams.

Integration Reality



QX Insights:

- **82%**
  of firms we engaged with believe stronger integration would help them realize more value from their existing technology

- **69%**
  report working across multiple tools without a fully connected workflow

Key Action Point:

Review how your current systems interact across execution, review, and reporting. Integration is often the next practical driver of value beyond adoption.

Discuss integration approaches shaping today’s CPA firms

Book a strategy session today

Operating Shifts

Capacity continues to influence operational decisions across firms of all sizes. Persistent hiring pressure is leading firms to look beyond traditional staffing models, focusing more on how work is structured and supported.

The shift is gradual but consistent: firms are moving toward operating models that combine internal teams, technology, and structured delivery support.

Outsourcing Adoption

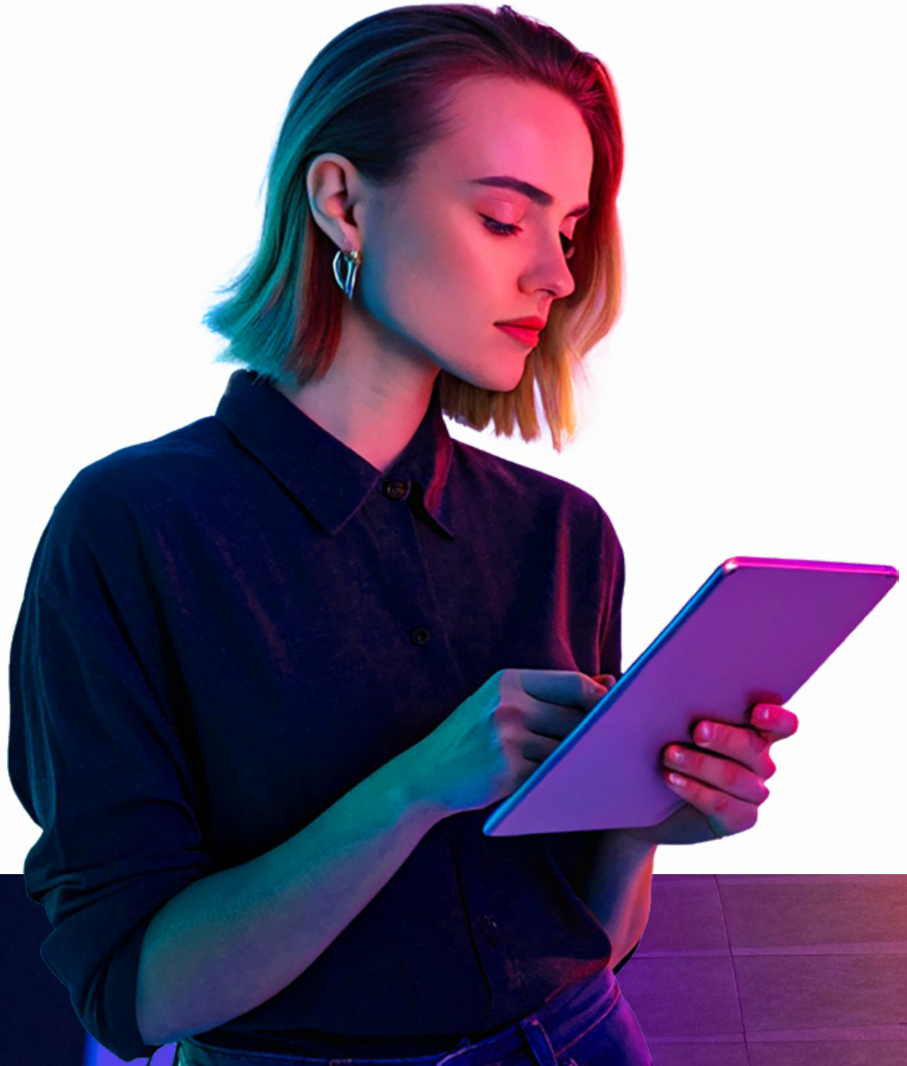
29%

of CPA firms use offshoring

46%

of top-performing firms use offshoring

Outsourcing Momentum



QX Insights:

- **34%**
  of firms we engaged with use some form of outsourced delivery support
- **51%**
  of growth-focused firms in our sample reported active use of global delivery teams

Key Action Point:

Evaluate how outsourced delivery fits within your firm's growth strategy, not only for capacity, but for workflow execution and consistency.

Understand how firms are structuring outsourced delivery today.

Let us chat?

Evolving Expectations from Outsourcing

Expectations from outsourcing have matured.

Firms are now evaluating external delivery partners based on workflow alignment, reporting visibility, governance, and review structures. Decisions are increasingly shaped by how well outsourcing supports the firm’s broader operating model, because it is not just about cost anymore.

> QXAS has helped us extend our capacity without compromising accuracy or control. Tax season is a high-pressure time for us. Before QX, it often felt like we were pushing the limits of our internal bandwidth. Now, we can handle more volume, faster, and with fewer bottlenecks.
>
> **Kevin Castillo, 3D Investments**

> The quality of QX candidates has been very consistent. It’s great to have a reliable team that can get the work done. Our experience with the entire team has been really good. Every candidate has been responsible, and the team is well managed.
>
> **Grace Cao, Goldin Group**

Signature Traits of High-Performing Firms

Higher-performing firms are demonstrating consistent patterns in how they design operations.

Common traits observed include:

- structured delivery models that combine internal and external teams
- automation applied at workflow level, not only in isolated tasks
- clear separation between execution, review, and advisory work
- defined visibility across engagement stages and turnaround times
- deliberate focus on freeing senior team capacity for higher-value work

These patterns reflect a shift from adding resources to designing systems.

Investment Trends

77%

of firms plan to increase AI investment

35%

of firms use AI daily

Investment Direction

QX Insights:

- **71%**
  firms we engaged with plan to expand automation use over the next 12–24 months

- **64%**
  indicate that future investment will focus on integrating automation with delivery support

Key Action Point:

Consider whether upcoming investments are directed toward acquiring new tools or building the operational structures that make current tools more effective.

Get a clearer view of where investments are creating measurable impact

Connect with us today

Strategy & Planning Framework

As firms evolve their operating models, five areas emerge as central to structured planning.

01

Automation Planning
Prioritize automation where it drives measurable efficiency across repeatable, high-volume work rather than isolated tasks.

02

Workflow Structuring
Define clear stages, ownership, and review points across engagements to strengthen consistency and visibility.

03

Global Delivery Integration
Position outsourcing as part of the operating model, aligned to workflow design, reporting, and quality standards.

04

Advisory Shift
Create senior team capacity by redistributing routine work through automation, structured teams, and delivery support.

05

Governance & Visibility
Establish reporting frameworks that provide visibility into turnaround, quality, and workload distribution.

These areas support a more scalable, structured operating environment.

Direction Forward: 90-Day & 12-Month Outlook

A practical planning outlook for firms evaluating their operating model.

Over the next 6–12 months

- Standardize workflows across repeatable engagements
- Align outsourcing use with delivery structure and reporting expectations
- Introduce visibility mechanisms across execution & review stages

Over the next 12 months & beyond

- Build a defined operating model integrating automation, internal teams, and global delivery
- Prioritize investments that strengthen structure and scalability, not only tool adoption
- Position advisory expansion within a supported delivery framework

Within the next 90 days

- Review current automation depth across workflows
- Identify workflow bottlenecks and integration gaps
- Assess how senior team time is currently deployed

This structured outlook provides a starting point for firms planning their next phase of operational development.

Closing Perspective

CPA firm operations are entering a more structured phase of transformation. Technology adoption is widespread, but the firms creating sustained value are those aligning automation, delivery, and workflow design as part of a single operating model.

The direction is clear: efficiency, scalability, and execution maturity are becoming the defining capabilities of the modern firm. The next stage will be shaped less by adopting more tools and more by building the operating structures that allow them to scale.

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