2025 REPORT

The State of Accounting
Workflow and Automation

Get the strategies and benchmarks to smoothen your firm's operations in 2025 with feedback from 816 accountants, bookkeepers, and tax pros, plus insights from nine industry thought leaders.

ALSO INSIDE: Platform data from Financial Cents, free workflow templates from our community library, a workflow automation ideas library.
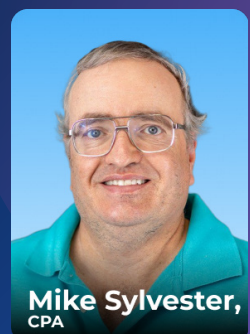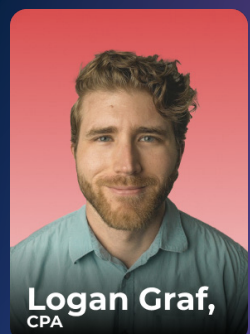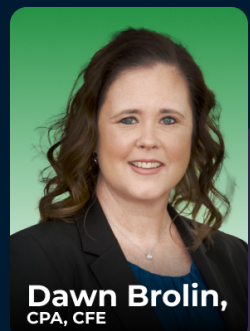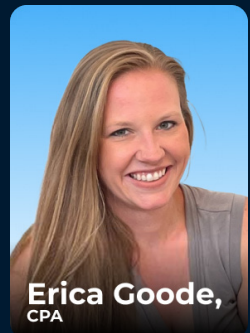
Kellie Parks,
CPB

Erica Goode,
CPA

Dawn Brolin,
CPA, CFE

Logan Graf,
CPA

Roman Villard,
CPA

Kelly Rohrs,
CPA

Nick Boscia,
CPA, EA

Chad Davis,
CPA

Mike Sylvester,
CPA
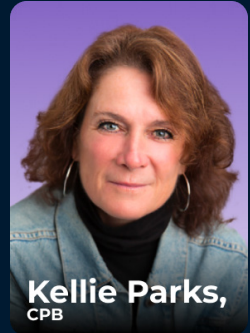
Table of contents

Introduction

The 2025 State of Workflow Automation Report captures the experiences of 816 accounting, bookkeeping, and tax firm owners, primarily in North America. Our respondents—firm owners and admins—offer a firsthand look into the daily realities of managing an accounting firm and the evolving role of workflow automation.

This year, we expand on our past research with deeper insights and new resources to help firms optimize their operations.
We explore:

We share insights into:

✅ The biggest challenges firms faced in 2024

✅ Why workflow inefficiencies remain a major pain point for firm owners

✅ Key areas of a firm that can and should be automated

✅ The short- and long-term benefits of workflow automation

✅ How to recognize when it's time to automate—featuring real-life experiences from firm owners like you

✅ The must-have features of workflow automation software

✅ How to measure the success of workflow automation in your firm

✅ How to know if workflow automation is working for you

We started the State of Workflow Automation Report in 2023 because we wanted to share insights from actual firm owners on the impact of workflow automation on their firms and how it affects their ability to get work done.

Our survey respondents represent firms of all sizes:
· 41.6% have 2 to 5 employees,
· 29% are solo practitioners,
· 15.1% have 6 to 10 employees,
· 7.1% have 11 to 20 employees,
· 7.1% have 20+ employees.

In terms of work environment, 49.3% operate fully remotely, 36.7% follow a hybrid model, and 14% work onsite.

This report is brought to you by Financial Cents.

LEARN MORE ABOUT FINANCIAL CENTS >

Overview

Welcome to the third edition of the Financial Cents State of Accounting Workflow Automation Report. This year's data revealed several compelling insights that stand out:

Workflow remains a top challenge for accounting firms, with inefficiencies, client communication delays, and manual administrative tasks ranking among the biggest pain points.

Getting documents from clients is still the biggest workflow issue, surpassing manual administrative tasks, which were the primary challenge in previous years.

Workflow inefficiencies continue to impact firm owners' work-life balance, with many taking work home, constantly thinking about work during social outings, and experiencing increased stress and anxiety.

Before automation, 53.8% of firms spent over 5 hours per week scheduling and assigning work. Post-automation, 75.8% reduced this time to 5 hours or less, significantly improving efficiency.

Many firms still rely on spreadsheets, even as they express a strong interest in transitioning to automation. However, concerns about firm size suitability and the overwhelming number of available software options are major barriers.

59.2% of firms reported that their initial attempts at solving workflow issues were successful. Their efforts included implementing structured processes (65.2%), investing in workflow automation software (64.3%), and staff training (25.7%).

Firms recognized the need for automation when they began hiring staff, lost track of key tasks, or struggled to keep up with increasing client demands. Some even reported losing clients due to workflow inefficiencies.

The most sought-after workflow software feature is a centralized dashboard (73.9%), followed by client reminders (69.3%) and a client portal (60.6%). Recurring task automation remains a high priority.

66.1% of firms assess the success of workflow automation by how smoothly their systems and processes run, reinforcing last year's trend.

Read on for deeper insights, expert recommendations, and actionable strategies to help you optimize workflow automation and improve operational efficiency in your firm.

Who Weighed In?

FIRM SIZE

2-5 Staff — 37.5%

Solo Practitioners — 34.2%

6-10 Staff — 12.1%

20+ Staff — 8.7%

11-20 Staff — 7.5%

2- to 5-employee firms made up the largest share at 37.5%, closely followed by solo practitioners at 34.2%. This distribution aligns with industry trends, as recent data indicates that small firms continue to drive growth in the accounting sector, often leveraging automation tools to manage increasing workloads with lean teams. Insights highlight that firms with fewer than five employees are the fastest adopters of workflow automation solutions, aiming to improve efficiency and client service.

Additionally, data from Financial Cents' 2024 Firm Revenue Report indicates that solo accounting and bookkeeping firms made an average revenue of $62,327, while firms with 2 to 5 employees averaged $292,292 in revenue. This underscores the prevalence and economic significance of smaller firms specializing in bookkeeping and related services.

OPERATING MODE

Remote — 51.2%

Hybrid — 33%

On-site — 15.8%
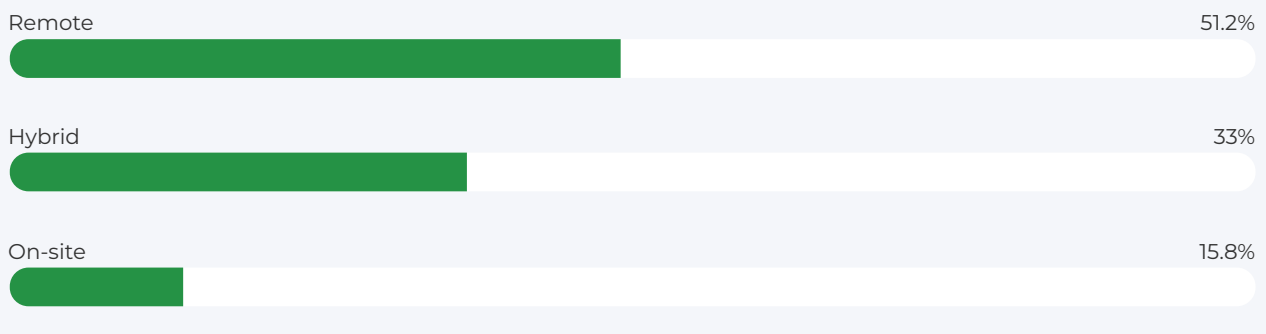
Most respondents operate remotely, with only 15.8% working exclusively on-site. This trend aligns with broader industry patterns. For instance, a 2024 report by Robert Half indicates that 37% of U.S. job seekers are interested in fully remote positions, while 60% prefer hybrid roles. Additionally, 31% of professionals planning to seek new employment cite the desire for more work flexibility as a primary motivator.

FIRM TYPE:

Bookkeeping — 84.8%

Accounting — 63%

Tax — 54.9%

Advisory — 51%

CPA — 30.9%
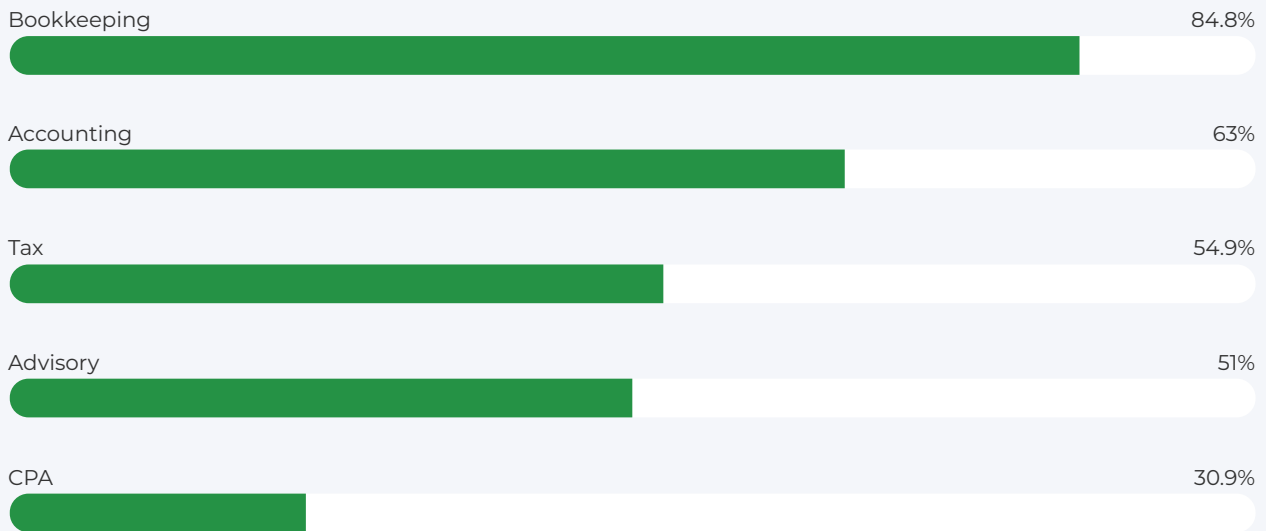
The majority of respondents are from bookkeeping firms, closely followed by accounting, tax, and advisory firms. This trend reflects the broader composition of the accounting services industry, where bookkeeping services represent a significant segment.

Interestingly, the industry is experiencing a notable shift towards client advisory services (CAS) as a key growth area. This evolution suggests that while traditional bookkeeping remains foundational, firms are expanding their services to include more strategic advisory roles, aligning with the diverse composition of respondents in the survey.

AVERAGE NUMBER OF CLIENTS SERVED ANNUALLY:

0 - 50 — 50.1%

101 - 500 — 22.4%

501+ — 14.8%

51 - 100 — 12.6%

The majority of respondents came from firms with 0 to 50 clients, reflecting the dominance of small firms—primarily solo practices to those with up to 5 employees (71.7%).

> **"**Time blocking, realistic scheduling, and workflow visibility are key for solo firm efficiency and client satisfaction.**"**

TOP TIP FOR BALANCING CLIENT WORK, ADMIN, AND FIRM MANAGEMENT WITHOUT BURNOUT:

Time blocking and being realistic about how long tasks take. Plan your upcoming week accordingly. If you can't fit everything in, push it to the next week or consider if something fundamental in your firm needs to change.

BIGGEST WORKFLOW CHANGE FOR EFFICIENCY AS A SOLO FIRM OWNER:

Using a visual dashboard to track all clients in real-time. This allows for quick status checks and better weekly planning—a game changer.

ONE THING A SOLO FIRM SHOULD AUTOMATE:

Reporting. There are excellent tools for reporting and forecasting that improve quality and efficiency. With a solid SOP, you can easily replicate processes across multiple clients, reducing effort while enhancing client satisfaction.
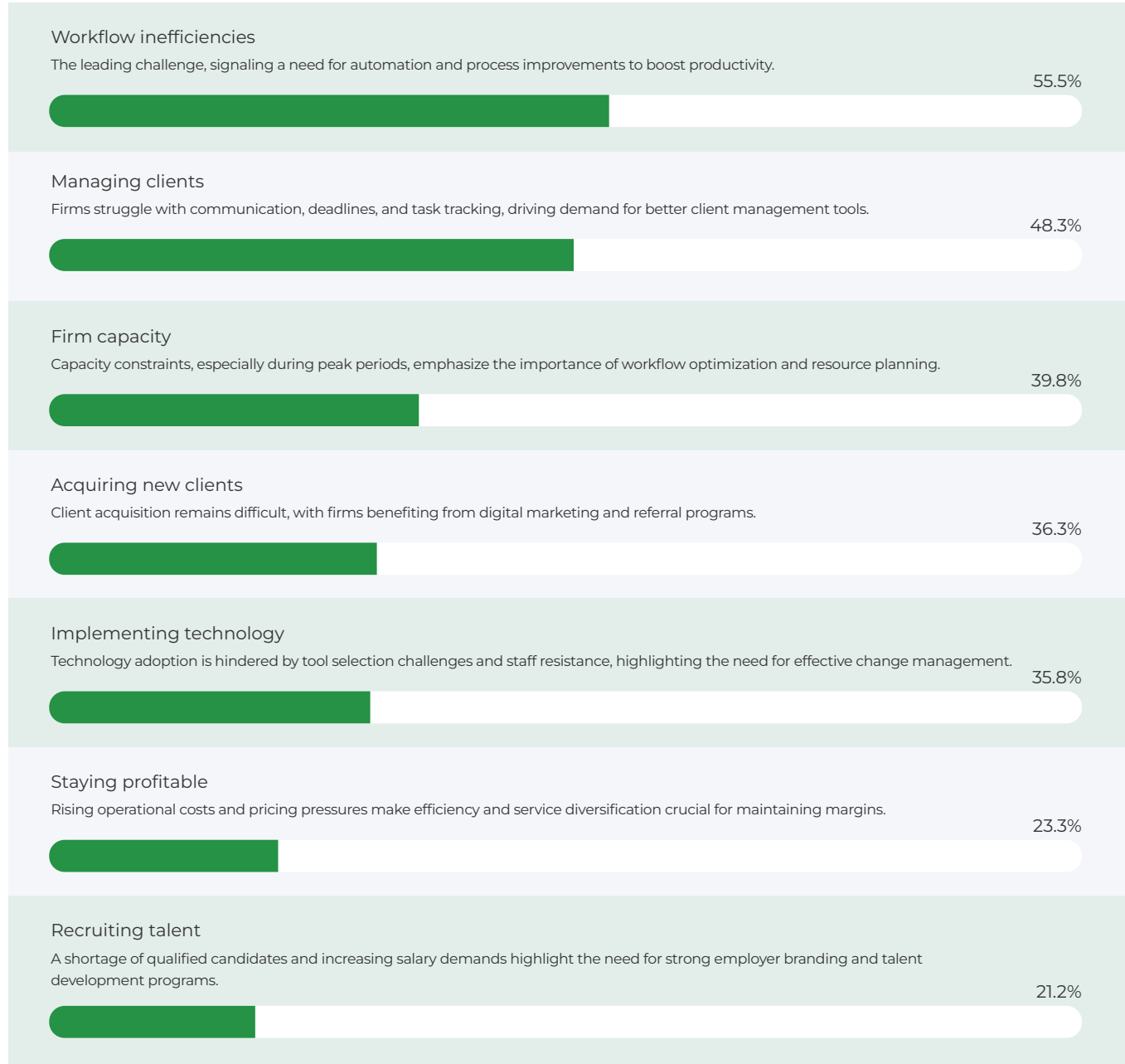
- ERICA GOODE, CPA
OWNER

Their Biggest Challenges In 2024

Top Challenges:

Workflow inefficiencies

The leading challenge, signaling a need for automation and process improvements to boost productivity.

55.5%

Managing clients

Firms struggle with communication, deadlines, and task tracking, driving demand for better client management tools.

48.3%

Firm capacity

Capacity constraints, especially during peak periods, emphasize the importance of workflow optimization and resource planning.

39.8%

Acquiring new clients

Client acquisition remains difficult, with firms benefiting from digital marketing and referral programs.

36.3%

Implementing technology

Technology adoption is hindered by tool selection challenges and staff resistance, highlighting the need for effective change management.

35.8%

Staying profitable

Rising operational costs and pricing pressures make efficiency and service diversification crucial for maintaining margins.

23.3%

Recruiting talent

A shortage of qualified candidates and increasing salary demands highlight the need for strong employer branding and talent development programs.

21.2%

Addressing these challenges through process automation, client management tools, and strategic technology implementation can significantly enhance firm efficiency and growth.

Biggest Workflow Challenges

FIRMS FACE SEVERAL WORKFLOW INEFFICIENCIES THAT IMPACT PRODUCTIVITY AND SERVICE QUALITY:

Bar chart values (left to right):
- 64%
- 54.7%
- 35.3%
- 33.1%
- 29.3%
- 25.2%
- 19.6%
- 17.2%
- 13.7%
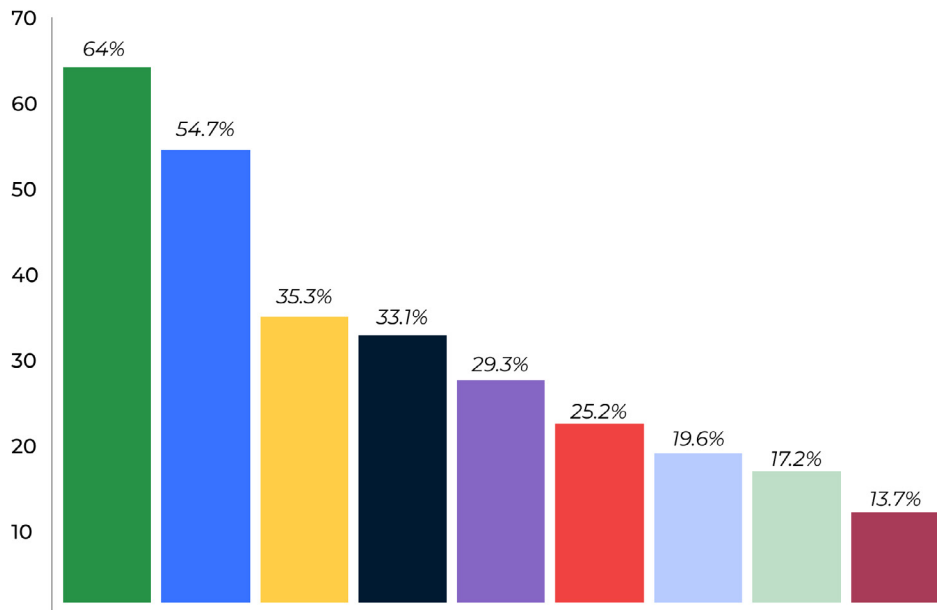
● **Chasing down clients for information** - The most common bottleneck, emphasizing the need for automated reminders and better client communication tools.

● **Manual administrative tasks** - Repetitive tasks take up valuable time, making automation a key priority for efficiency.

● **Onboarding new clients** – A slow, unstructured process highlights the need for standardized onboarding workflows.

● **Poor work visibility** – Lack of transparency in task progress calls for workflow management tools.

● **Poor systems and processes** – Inefficient internal operations hinder productivity, stressing the importance of process optimization.

● **Too many processes and tech to manage** – Disconnected tools and overly complex workflows create inefficiencies, highlighting the need for tech stack consolidation.

● **Employees not following set workflow standards** - Inconsistent adherence to processes results in missed steps and inefficiencies, underscoring the need for accountability and training.

● **Poor work handoff process** – A lack of structured task transitions leads to miscommunication and errors.

● **Onboarding new employees to client work** – Difficulty in training new hires delays productivity, emphasizing the need for structured onboarding and documentation.

Firms can overcome these challenges through automation, process standardization, and better training to ensure smoother workflows and improved efficiency.

Workflow Efficiency Ratings

**THE SURVEY RESULTS REVEAL THAT MOST FIRMS SEE ROOM FOR IMPROVEMENT IN THEIR WORKFLOWS:**
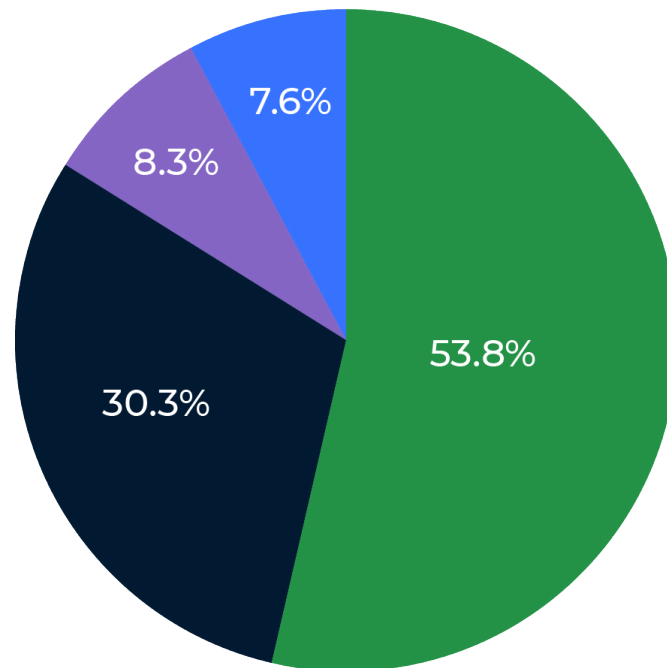
- 🟢 **Needs improvement** - Over half of the respondents acknowledge gaps in their current processes, signaling a strong demand for workflow optimization and automation.

- ⚫ **Efficient** - Nearly a third of firms are satisfied with their workflows, suggesting that effective processes and tools can drive productivity.

- 🟣 **Inefficient** – A smaller group faces significant workflow challenges, likely due to poor systems, manual processes, or lack of standardization.

- 🔵 **Very efficient** – Only a small percentage have highly optimized workflows, highlighting the opportunity for firms to adopt best practices from industry leaders.

These results emphasize the importance of process improvements, automation tools, and clear workflow standards to help more firms reach higher efficiency levels.

Biggest Workflow Challenges

FIRMS FACE SEVERAL WORKFLOW INEFFICIENCIES THAT IMPACT PRODUCTIVITY AND SERVICE QUALITY:

Bar chart values: 57.5%, 37%, 28.1%, 26.2%, 25.1%, 19.7%, 19.6%, 19.2%
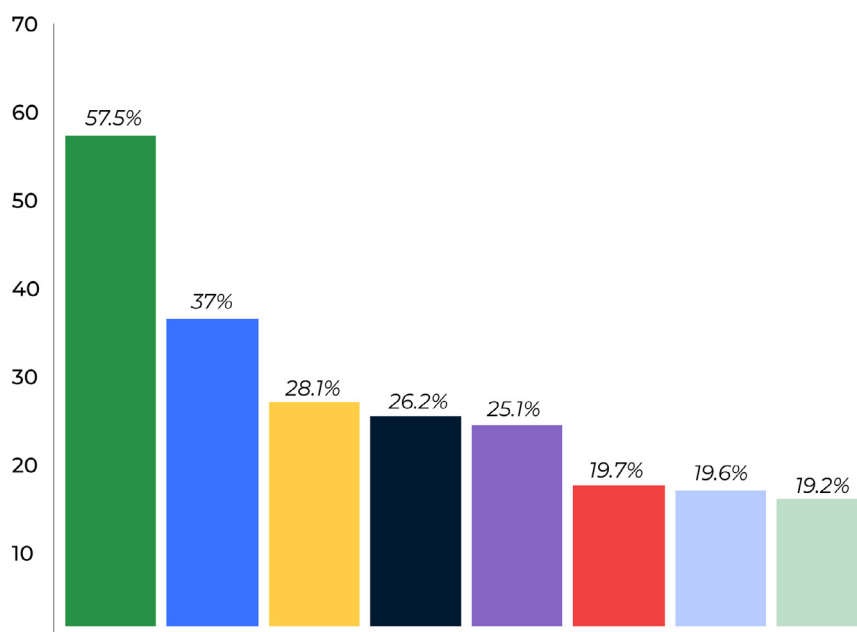
● **Poor work-life balance** - The most common consequence, as inefficient workflows lead to longer hours and increased burnout.

● **Missed deadlines** - Delays in completing work highlight issues with task management, visibility, and capacity planning.

● **Revenue impact** – Workflow inefficiencies reduce productivity, directly affecting profitability.

● **Errors and poor work quality** – Process breakdowns contribute to mistakes, damaging client trust.

● **Poor work distribution** – Uneven workloads create inefficiencies and strain among team members.

● **Friction with clients/clients leaving** – Delays, errors, and poor communication lead to client dissatisfaction and churn.

● **Disjointed team** - Poor collaboration and handoffs disrupt team synergy and productivity.

Firms can overcome these challenges through automation, process standardization, and better training to ensure smoother workflows and improved efficiency.

Biggest Workflow Challenges

FIRMS FACED SEVERAL WORKFLOW INEFFICIENCIES THAT IMPACT PRODUCTIVITY AND SERVICE QUALITY:

Chasing clients for information
The most common bottleneck, emphasizing the need for automated reminders and better client communication tools.

64%

Manual administrative tasks
Repetitive tasks take up valuable time, making automation a key priority for efficiency.

54.7%

Onboarding new clients
 A slow, unstructured process highlights the need for standardized onboarding workflows.

35.3%

Poor work visibility
Lack of transparency in task progress calls for workflow management tools.

33.1%

Poor systems and processes
 Inefficient internal operations hinder productivity, stressing the importance of process optimization.

29.3%

Too many processes and tech to manage
Disconnected tools and overly complex workflows create inefficiencies, highlighting the need for tech stack consolidation.

25.2%

Employees not following set workflow standards
Inconsistent adherence to processes results in missed steps and inefficiencies, underscoring the need for accountability and training.

19.6%

Poor work handoff process
 A lack of structured task transitions leads to miscommunication and errors.
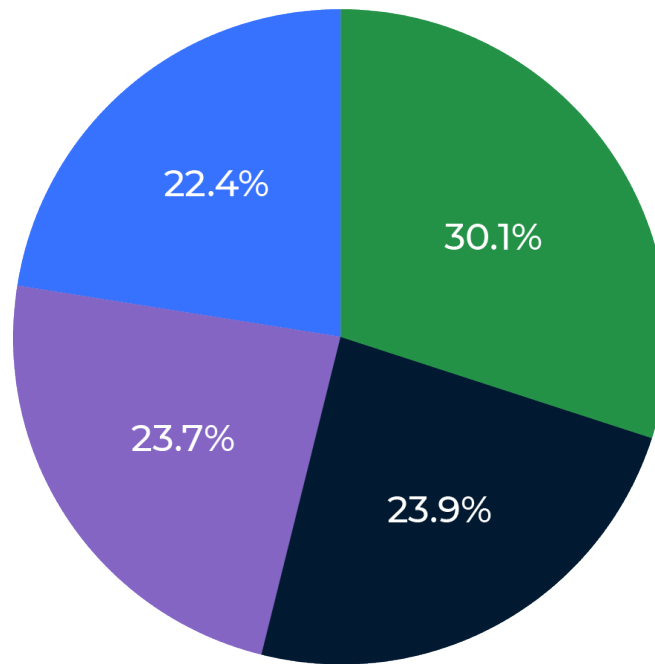
17.2%

Onboarding new employees to client work
Difficulty in training new hires delays productivity, emphasizing the need for structured onboarding and documentation.

13.7%

Firms can overcome these challenges through automation, process standardization, and better training to ensure smoother workflows and improved efficiency.

Workflow Review Frequency

- 🟢 **Monthly** - The largest group, showing a commitment to continuous improvement through frequent assessments and adjustments.

- ⚫ **Quarterly** - Nearly a quarter of firms review workflows every quarter, balancing regular check-ins with operational demands.

- 🟣 **Rarely** – A significant portion seldom evaluates their processes, missing opportunities for efficiency gains.

- 🔵 **Yearly** – While useful for long-term adjustments, annual reviews may be too infrequent to address evolving challenges.

These results highlight a need for more consistent workflow reviews, as regular optimization can significantly improve efficiency, reduce errors, and enhance client service.

> "Early automation, standardized processes, and clear client boundaries prevent workflow inefficiencies as firms scale."

ONE ESSENTIAL WORKFLOW INVESTMENT FOR GROWING FIRMS:

Automated billing/engagement letters and new lead processes are two of the simplest and most powerful workflows to invest in early. Both are practically hands-off for our firm!

HOW TO PREVENT WORKFLOW INEFFICIENCIES WHILE GROWING:

Automate everything you possibly can EARLY in the game. Setting up standardized processes (SOPs) and setting boundaries with clients can prevent workflow inefficiencies as your firm grows.

COMMON WORKFLOW BOTTLENECKS AS FIRMS SCALE:

Not having structured onboarding processes with new clients, not streamlining communication platforms, and lacking automations.

-KELLY ROHRS, CPA, P.C
FOUNDER

Adoption of Workflow Automation

Current Workflow Management Methods

THE SURVEY HIGHLIGHTS THE TOOLS FIRMS USED TO MANAGE THEIR WORKFLOWS, SHOWCASING A STRONG PREFERENCE FOR SPECIALIZED SOLUTIONS:
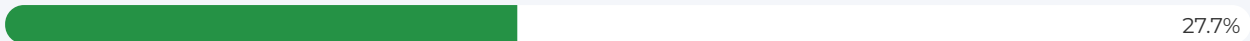
Accounting workflow software

The most popular choice, indicating firms' preference for industry-specific tools that streamline accounting processes and improve efficiency.
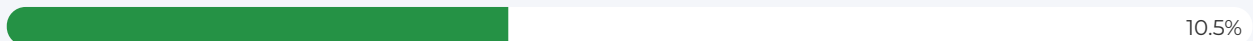
54%

Spreadsheets

Over a quarter of firms still rely on spreadsheets, signaling potential inefficiencies and a lack of automation.

27.7%

Generic project management tools

A small percentage use non-specialized tools, which may lack the features needed for accounting-specific workflows.

10.5%

These results suggest that while many firms have adopted specialized software, a significant portion still uses less efficient tools, presenting opportunities for technology upgrades to enhance productivity.

Case Study

How Infinite Accounting Solutions Collaborate and Automate Tasks with Financial Cents to Prevent Errors

INFINITE ACCOUNTING SOLUTIONS

Bookkeeping, Payroll, and Consulting Services	**British Columbia, Canada**
FIRM TYPE	LOCATION
2008	**Hybrid**
YEAR FOUNDED	WORKING STYLE

"Financial Cents enables us to send each document request as a line item to get their bank statements, credit card statements, receipts, etc.

Thanks to the (passwordless) client portal, clients can see completed and outstanding document requests, and Financial Cents will auto-remind them for us."

Stelle Anderson | OWNER OF INFINITE ACCOUNTING SOLUTIONS

❌ BEFORE

Stelle Anderson founded Infinite Accounting Solutions in 2008, initially balancing it alongside a full-time job. By 2015, the firm had grown significantly, prompting Stelle to dedicate herself to it full-time.

As the team expanded to seven members and took on over 110 clients, they relied on Trello for task management. While Trello served its purpose initially, it lacked accounting-specific features like task recurrence, leading to increased administrative hours and potential errors.

✅ AFTER

Seeking a more tailored solution, Stelle transitioned the firm to Financial Cents. This platform provided the necessary accounting-specific automation, reducing administrative workload and minimizing errors.

The passwordless client portal enhanced client collaboration by allowing clients to view and respond to document requests seamlessly. Automated reminders ensured timely submissions, further streamlining operations.

Read the case study   **Start a free trial**

Areas Firms Have Automated

FIRMS FACED SEVERAL WORKFLOW INEFFICIENCIES THAT IMPACT PRODUCTIVITY AND SERVICE QUALITY:
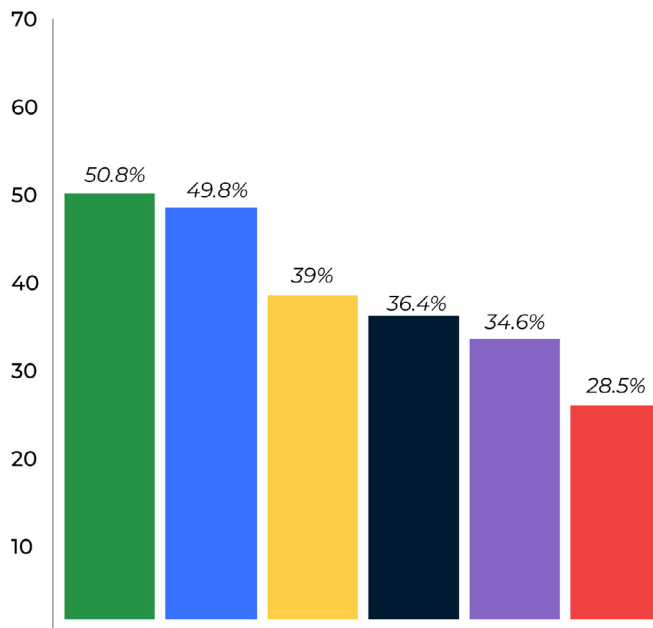

- 🟢 **Tracking work status** – The most automated area, reflecting the importance of real-time visibility into projects and deadlines.

- 🔵 **Client document collection** – Nearly half of firms automate document requests and uploads, reducing follow-ups and speeding up workflows.

- 🟡 **Scheduling work** – Many firms use automated scheduling tools to assign tasks and manage deadlines more efficiently.

- ⚫ **Payment collection** – Automation in invoicing and payments helps firms get paid faster and reduces administrative work.

- 🟣 **Onboarding clients** – Fewer firms automate client onboarding, suggesting room for improvement in this critical process.

- 🔴 **No automation** – A significant portion of firms still do not automate their workflows, missing opportunities for increased efficiency and productivity.

These insights highlight the areas where automation is driving the most value and where firms have opportunities to further streamline their operations.

💡 *Financial Cents Platform Insight* 💡

Client request reminders are the most used automation, followed closely by project tagging automation.
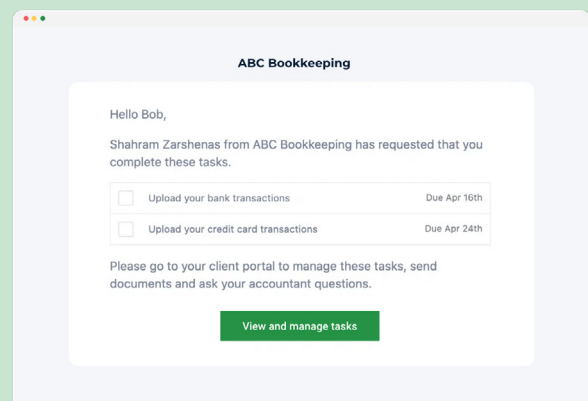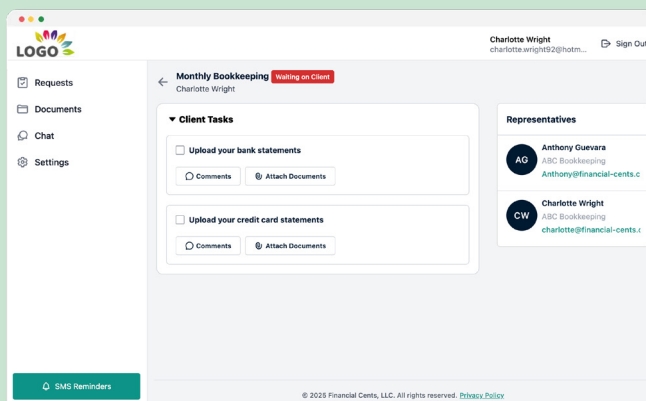
Spreadsheet Users' Experience with Workflow Management

AMONG THE 27.7% OF FIRMS USING SPREADSHEETS FOR WORKFLOW MANAGEMENT, EXPERIENCES ARE MIXED, WITH MANY SEEKING BETTER SOLUTIONS:

It works
Over half of users find spreadsheets sufficient for their needs, indicating familiarity and ease of use.

50.9%

Not good, looking for an alternative solution
A significant number are dissatisfied, highlighting the limitations of spreadsheets for managing complex workflows.

44.2%
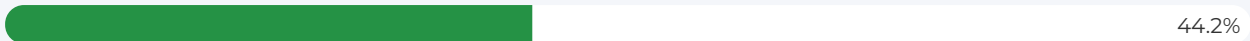
Excellent
Only a small fraction rate spreadsheets highly, suggesting that few firms find them ideal for long-term workflow management.

4.9%
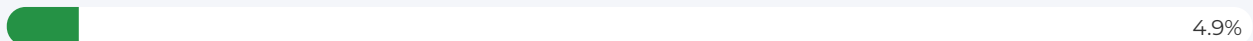
These results highlight that while spreadsheets remain a common tool, many firms are actively seeking more efficient, automated solutions tailored to their workflow needs.

Before Automation

Time Spent Scheduling and Assigning Work Before Workflow Automation

Among the 54% of firms using accounting workflow software, the survey reveals how much time they spent reviewing and updating work status across their firm before adopting automation:

These findings underscore the time savings and productivity gains that workflow automation delivers. It frees firms from time-consuming manual status updates and enables real-time visibility into work progress.
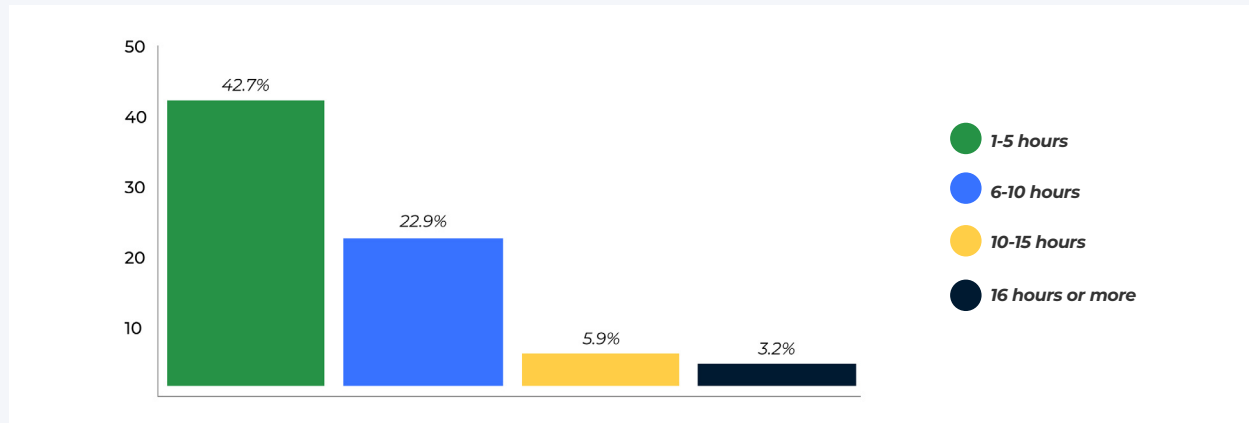
Time Spent Reviewing and Updating Work Status Before Workflow Automation

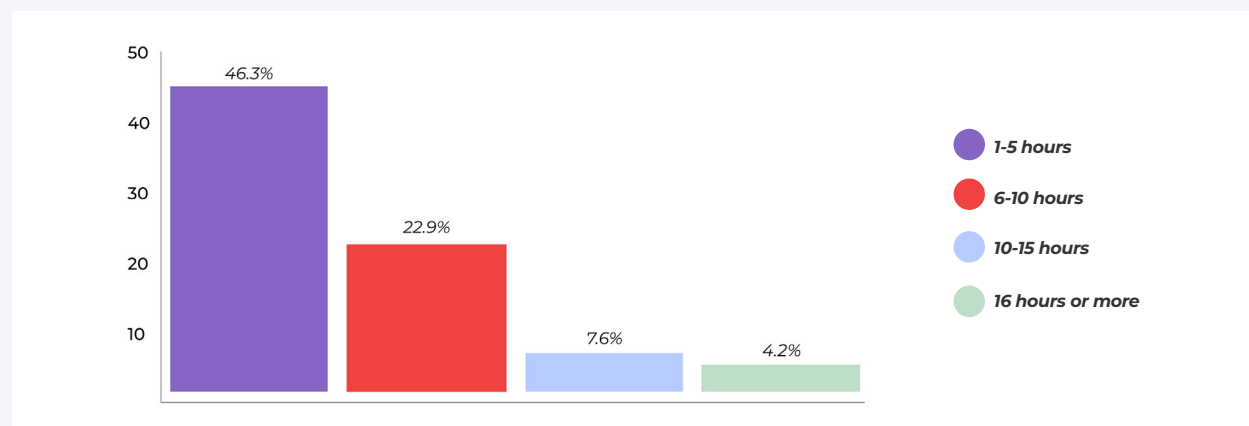Among the 54% of firms using accounting workflow software, the survey reveals how much time they spent reviewing and updating work status across their firm before adopting automation:

These findings underscore the time savings and productivity gains that workflow automation delivers. It frees firms from time-consuming manual status updates and enables real-time visibility into work progress.

Client and Staff Onboarding Experience Before Workflow Automation
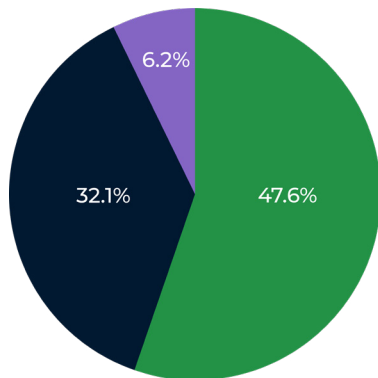
● **Clunky** – Nearly half of respondents described their onboarding as inefficient, slow, and disorganized, signaling a major pain point.

● **Just there** – About a third rated their onboarding as functional but lacking structure or efficiency.

● **Smooth** – Only a small percentage had a streamlined onboarding process, highlighting room for improvement across the industry.

These results emphasize how automation can significantly improve onboarding by introducing standardized workflows, automated reminders, and clear task assignments for both clients and staff.

> "Set clear client expectations, maintain control of engagements, and ensure clients align with your firm workflows."

SETTING CLEAR CLIENT EXPECTATIONS TO AVOID BOTTLENECKS:

Having a consistent standard workflow that you teach and train your clients on is key. Bottlenecks happen when we let the client be in control of the relationship and engagement—we have to be in charge. For example, when we onboard a tax client, we require them to upload a copy of their tax return. We monitor how long it takes them and if they struggle with it since we want clients who can handle technology. If you don't have a consistent workflow, every client is handled differently, making things more complicated. Bottlenecks happen because of us.

HANDLING CLIENTS WHO REFUSE TO FOLLOW THE WORKFLOW:

You have to decide if you want to keep them. If a client refuses to engage with the way we do things, they're just not a client for us. If we say, 'We charge upfront for tax returns,' and they don't want to prepay, then we're not the place for them. There's only so much give and take. If it becomes painful, it might be time to break up with them. Maybe damaging the relationship isn't a bad thing. We do have one client who's hard to work with—she owns ice rinks, horses, rental properties, and is always busy. But she pays us a lot of money, so we put up with it. A $500-$600 tax return client who's difficult? I don't have time for that.

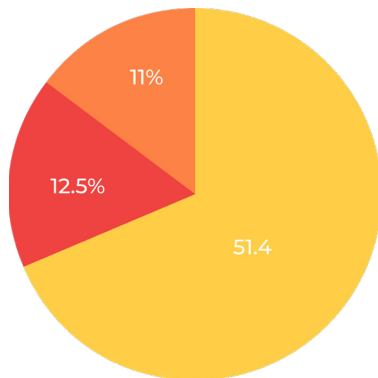### A GAME-CHANGING WORKFLOW IMPROVEMENT:

Getting paid upfront. When you finish a return, you then have to go into QuickBooks or wherever, process the payment, remember to do it, and have time to do it—or you forget. With prepayment, everything just works out perfectly.

- DAWN BROLIN, CPA
CEO, POWERFUL ACCOUNTING

# Firm Collaboration Before Workflow Automation

- 11%
- 12.5%
- 51.4

● **Somewhat collaborative** – Over half of respondents experienced moderate collaboration, indicating some teamwork but with room for improvement.

● **Highly collaborative** – Only a small percentage achieved strong collaboration, suggesting that most firms lacked the tools or processes to facilitate seamless teamwork.

● **Not collaborative at all** – A notable portion struggled with poor communication and siloed workflows, hindering productivity and efficiency.

These findings highlight how workflow automation can improve collaboration by providing real-time visibility into tasks, centralizing communication, and streamlining handoffs between team members.

Document Collection Speed Before Workflow Automation

● **Slow (several days)** – Nearly half of firms experienced delays of several days, indicating inefficient follow-up processes and client communication gaps.

● **Averagely fast (2-3 days)** – Less than a quarter received documents within a few days, showing moderate efficiency but still room for improvement.

● **Extremely slow** – Nearly one-fifth faced severe delays, which likely caused missed deadlines and workflow disruptions.

● **Extremely fast (same day to 1 day)** – Only a small fraction achieved rapid document turnaround, highlighting how rare efficient document collection was without automation.

- 1.9%
- 18.5%
- 23.1%
- 49.9%
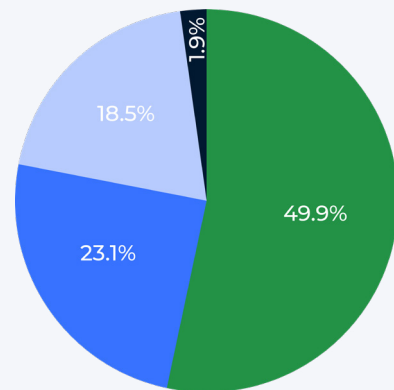
These findings emphasize the value of workflow automation tools, such as automated reminders and secure client portals, in accelerating document collection and reducing delays.

Steps Taken to Address Workflow Challenges

When firms first encountered workflow issues, they adopted various strategies to improve efficiency and productivity:
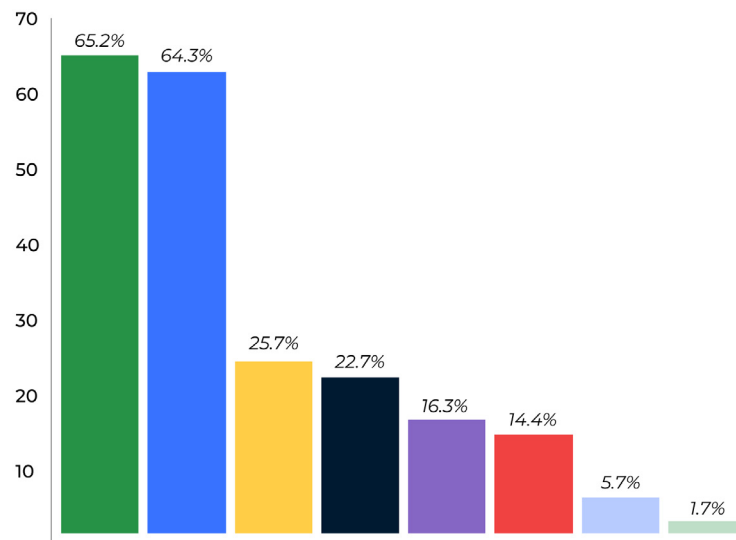
- ● **Set up workflow processes** – The most common response, highlighting the importance of structured workflows in tackling inefficiencies.

- ● **Bought workflow automation software** – Nearly as many turned to technology to streamline operations, indicating a strong push for automation solutions.

- ● **Trained staff** – A quarter focused on improving team skills and process adherence.

- ● **Moved work around among staff** – Some addressed capacity issues by redistributing workloads.

- ● **Gave clients unlimited access via email, text, and phone** – A smaller group attempted to speed up client responses through open communication channels, though this often leads to inefficiencies.

- ● **Hired more staff** – A minority expanded their teams to handle workload demands.

- ● **Incentivized staff to perform better** – Few relied on performance incentives to drive productivity.

- ● **Slammed penalties on clients for late document submissions** – Only a small fraction resorted to punitive measures for client delays.

These insights underscore that while automation and structured processes are the most popular solutions, firms are also exploring a mix of staffing adjustments, training, and client engagement strategies to address workflow challenges.

Effectiveness of Actions Taken to Address Workflow Challenges

The survey reveals how firms rated the effectiveness of their efforts to resolve workflow issues:

Yes – Nearly half found their actions effective, particularly those who implemented workflow automation and structured processes.
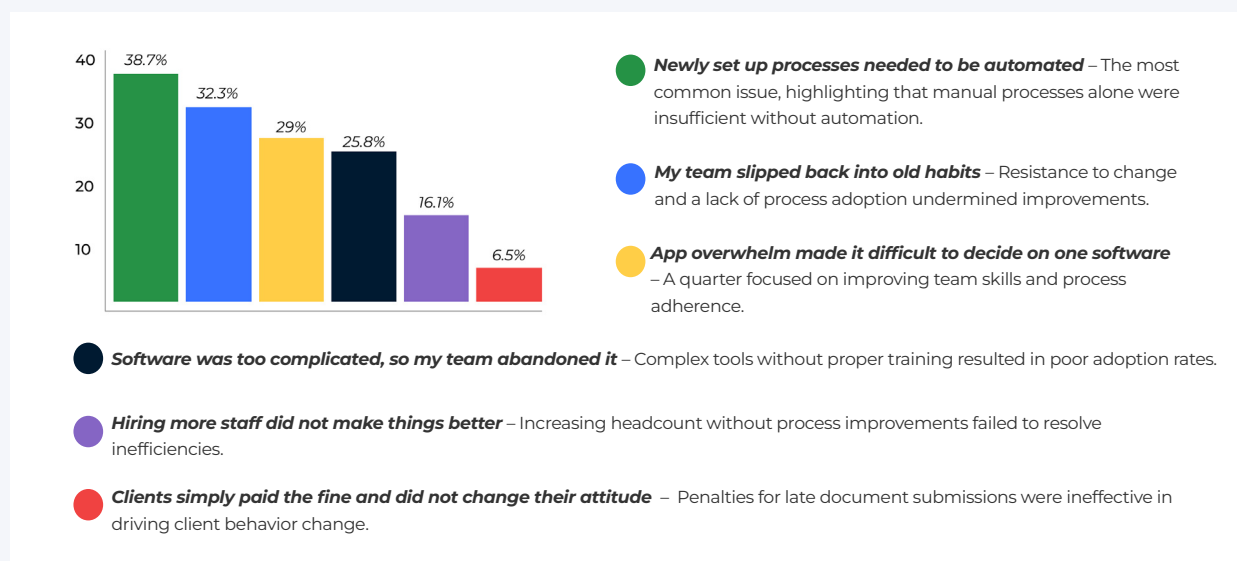
Slightly – A significant portion saw some improvement but not a complete resolution, suggesting partial success from their strategies..

No – A small group found their actions ineffective, indicating that their solutions, such as staff incentives or penalties for clients, may not have addressed the root causes of their workflow issues.

These results highlight that while many firms benefited from structured processes and automation, others may need to refine their strategies or adopt additional solutions to achieve lasting improvements.

Reasons Why Initial Workflow Solutions Were Ineffective

Among respondents who found their initial actions ineffective, the survey identifies key obstacles that hindered success:

Newly set up processes needed to be automated – The most common issue, highlighting that manual processes alone were insufficient without automation.

My team slipped back into old habits – Resistance to change and a lack of process adoption undermined improvements.

App overwhelm made it difficult to decide on one software – A quarter focused on improving team skills and process adherence.

Software was too complicated, so my team abandoned it – Complex tools without proper training resulted in poor adoption rates.

Hiring more staff did not make things better – Increasing headcount without process improvements failed to resolve inefficiencies.

Clients simply paid the fine and did not change their attitude – Penalties for late document submissions were ineffective in driving client behavior change.

These insights underscore that while automation and structured processes are the most popular solutions, firms are also exploring a mix of staffing adjustments, training, and client engagement strategies to address workflow challenges.

Why Actions Taken Were Effective

Respondents who successfully addressed workflow challenges identified key factors that contributed to their success:

1. Implementation of Workflow Automation Tools

· Many credited *Financial Cents* and other workflow software for streamlining their processes, improving task tracking, and increasing overall efficiency.

· *Automation of recurring tasks and client reminders* significantly reduced manual work and follow-ups.

· Having a **centralized platform** for work visibility helped teams stay on track.

2. Structured and Standardized Processes

· Firms that *established clear workflow*s and *documented procedures* saw immediate improvements.

· Standardizing processes helped ensure *consistency, accountability, and repeatability* in work management.

· Workflow automation allowed firms to *eliminate inefficiencies and reduce errors* in task handoffs.

3. Improved Team Adoption and Collaboration

· Success often depended on *team buy-in*— firms that focused on training and change management saw better adoption rates.

· *Cross-training staff* improved team flexibility and reduced bottlenecks.

· Collaboration improved with *better visibility into tasks and project statuses.*

4. Enhanced Client Communication and Document Collection

· *Automated client reminders* via multiple channels helped speed up document collection and reduced follow-ups.

· The introduction of **client portals** provided a seamless way for clients to submit information, improving response times.

· Firms that previously struggled with *delayed documents saw quicker turnaround times* after implementing structured communication processes.

5. Reduction in Administrative Burden and Time Savings

· Automating workflows freed up time for *higher-value work*, allowing staff to focus on client service and advisory roles.

· Many reported that workflow automation significantly *reduced admin work and prevented missed deadlines.*

6. Scalability and Growth

· Firms that implemented *structured systems early* found it easier to *scale operations, onboard new staff, and manage workload distribution.*

· Having a *standardized process across multiple locations or teams* ensured efficiency as firms expanded.

These insights highlight that firms that combined technology, structured processes, team training, and client communication strategies experienced the most success in overcoming workflow challenges.

💡 *Financial Cents Platform Insight* 💡

The most commonly used communication feature in Financial Cents is Email, followed closely by in-app chat messages and client task comments.
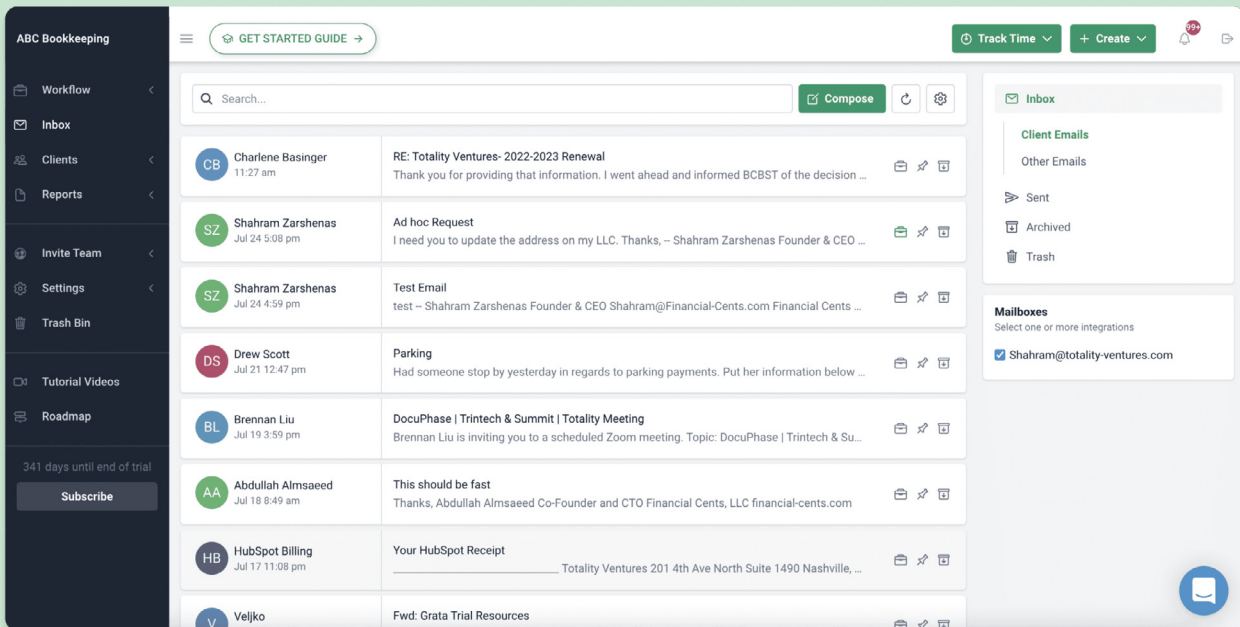
"Improve efficiency by setting client-specific deadlines."

GETTING CLIENTS TO PROVIDE INFORMATION ON TIME:

Schedule out information deadlines for each client instead of having a broad deadline for all clients. This helps spread the work out and sets clear expectations.

USING SOCIAL MEDIA TO IMPROVE CLIENT RELATIONSHIPS AND WORKFLOWS:

Communicating over LinkedIn and other social media platforms allows firms to be transparent in how they operate, allowing better fits to find them.

A WORKFLOW TIP MORE FIRMS SHOULD IMPLEMENT:

I wish more firms would try to make 'busy' season not busy. Run your firm like a business owner, not an accountant.

- LOGAN GRAF, CPA
OWNER, THE GRAF TAX CO. PLLC

Defining Moments That Led Firms to Automate Workflows

The decision to automate workflows often came from moments of **overwhelm, inefficiency, and missed deadlines**. Many firms reached a breaking point when they realized that **manual processes were slowing them down, impacting profitability, and causing stress**.

Below are the common themes from respondents, along with a selection of compelling quotes.

1. Work Falling Through the Cracks

- Many firms realized they were **missing deadlines, losing track of tasks, and struggling with visibility into ongoing work.**

- As workloads grew, **important client tasks were overlooked**, leading to inefficiencies and frustration.

> "Long, long nights updating spreadsheets for internal processes, realizing shit wasn't complete when I expected it to be. There was no visibility into engagement status."

> "I dropped the ball on a few clients, or ended up doing things after the fact. It was embarrassing."

> "This year-end got away from me—no tracking, no visibility. I knew I needed a system."

> "The moment I asked 'Where is Client X at?' and no one could answer me."

> "Things were falling through the cracks, and clients and staff were getting annoyed."

2. Increased Client Volume Made Manual Tracking Impossible

· Many firms started small and were able to manage workflows manually. But **as client numbers grew, spreadsheets and manual tracking became unsustainable.**

· The need for **scalability and efficient task delegation** became apparent.

> "Adding more clients, it became obvious that without workflows and information in one place, tasks would slip through the cracks."

> "I wanted to grow my firm but felt stuck— like I couldn't scale without a better system."

> "The moment I hit 20 clients, everything fell apart. Spreadsheets just couldn't keep up."

> "We needed automation when we took on more corporate and bookkeeping clients. It was too much to track manually."

> "I was building my firm with automation in mind from day one because I knew growth would be impossible without it."

3. Overwhelming Administrative Work

· Many respondents found that they were **spending too much time on administrative tasks rather than revenue-generating work.**

· **Chasing clients, managing email threads, and manually tracking deadlines** were major pain points.

> "I was spending so much time sending emails and tracking things, and not getting the paid work done!"

> "When I realized I was spending more time on admin than revenue-generating work."

> "Without automation, a lot of time was being wasted on collecting data instead of analyzing it."

> "I was losing hours every week manually scheduling tasks and following up with clients."

> "When I realized I was spending time away from my toddler doing admin work. Admin work!"

4. Lack of Visibility and Disorganized Workflows

- Firms struggled with **tracking project statuses, work distribution, and collaboration** among team members.

- Remote and hybrid work environments **exacerbated visibility issues,** making real-time updates crucial.

> "When I couldn't remember the processes from client to client, wasting time setting up the same workflows over and over."

> "I had too many piles of work around me and didn't know what was where. It was just overwhelming."

> "Clients were frustrated because we had no visibility, and everything felt like a guessing game."

> "I spent more time looking for information than actually completing work."

> "When requests were duplicated by multiple staff, causing workflow inefficiencies and chaos."

5. Client Communication and Document Collection Bottlenecks

- Many firms struggled with **clients sending documents in multiple formats, forgetting to send key information, or responding only after multiple follow-ups.**

- The lack of a **centralized, automated request system** led to delays and inefficiencies.

> "Clients sending docs from five different ways became too much to track easily."

> "When my client texted me six pages of a bank statement in .jpg format. Turning that into a PDF took forever. I needed a portal."

> "Client reminder emails were manual and exhausting. Most of my time was spent chasing, not working."

> "Clients didn't respond until I personally emailed them, which was unsustainable."

> "When a client submitted documents via the portal for the first time without me chasing—it was life-changing."

7. Learning from Other Firms and Industry Leaders Workflows

· Some respondents realized they needed automation after **learning from more successful firms** or **attending industry webinars**.

· Seeing **how other firms leveraged workflow automation** provided the push they needed.

> "Talking with bigger, more successful firms about how they got to where they are."

> "Talking with bigger, more successful firms about how they got to where they are."

> "When I saw a demo of workflow software, it clicked. I couldn't go back to spreadsheets."

> "I learned from my old firm's mistakes—they refused to adopt new technology, and it cost them."

> "I attended a conference and saw how easily other firms tracked their workflows. I felt behind."

Conclusion

The defining moment for most firms came when **manual processes became too time-consuming, disorganized, and unscalable**. Whether it was **missed deadlines, document chaos, administrative overload, or stress-induced burnout**, these pain points pushed firms to seek workflow automation. Those who took action found that **automating processes improved efficiency, reduced errors, and helped them regain control over their workload and work-life balance.**

> " Leverage technology, shed unfit clients, and use practice management software to maintain profitability."

MAINTAINING EFFICIENCY AT SCALE:

Scaling is hard and not for everyone. The key is to install good practice management software, have strong internal procedures, and ensure your team is efficient and effective before you scale. Too many firms try to scale too fast, leading to a variety of problems.

A COMMON WORKFLOW MISTAKE THAT IMPACTS THE BOTTOM LINE:

Firms should fully understand everything their practice management software can do by getting feedback from all team members and integrating it throughout the firm. Additionally, I work hard to ensure my firm does not onboard too much work. There is nothing wrong with extensions, and clients need to understand this.

BALANCING EFFICIENCY AND QUALITY SERVICE:

Technology and AI are changing the accounting industry quickly, and I feel our industry is going through more change than any other time over the last 20 years.

The key for us has been establishing a very large funnel of new leads reaching out to our firm. Once you have a large number of potential new clients, you can improve efficiency by shedding clients that do not fit your business model. Quality service is a growing problem—more than half of the new clients I onboard have significant errors in their bookkeeping, which translates to errors in their tax returns. The key to quality is to focus on clients who fit your model and ensure their bookkeeping is correct by doing it yourself or frequently checking and training those responsible for it.

- MIKE SYLVESTER, CPA
MANAGING PARTNER, SBS CPA GROUP, INC PLLC

Barriers to Adopting Accounting Workflow Automation Software

The survey reveals that firms face several challenges preventing them from implementing workflow automation software. The top reasons include **cost concerns, time constraints, and feeling overwhelmed by the options and implementation process.**

Key Barriers to Adoption:
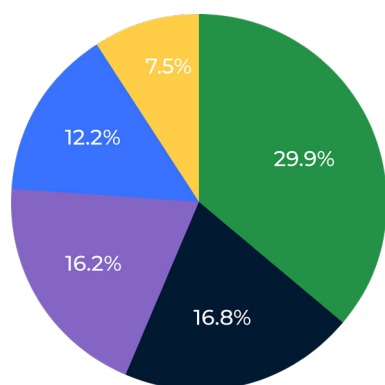
- **Overwhelmed by the many choices** – Decision paralysis is a major hurdle, with firms struggling to choose the right solution from a crowded market.

- **Not sure my firm is ripe for it** – Some are unsure if their firm size or processes warrant automation.

- **Setting the right foundation first** – Many prefer to refine their internal processes before adopting automation.

- **No reason** – A portion simply hasn't prioritized automation.

- **Content with spreadsheets** – A few are comfortable with their existing systems.

Cost and Financial Concerns:

- Cost was mentioned frequently, with several firms citing software pricing and implementation expenses as key blockers.

- **"Expense", "Financial and budgetary considerations", and "Too small to pay for automated procedures"** were common themes.

Time Constraints and Implementation Overwhelm:

- Many firms feel they **lack the time or resources** to implement new software:
  - "Takes a long time to implement"
  - "Time constraints with pending work"

- **"Expense", "Financial and budgetary considerations", and "Too small to pay for automated procedures"** were common themes.

Case Study

How Financial Cents Helps Fiscally Professional Corporation Scale Efficiently While Maintaining High-Quality Service

FISCALLY PROFESSIONAL CORPORATION

Serving Growth-Driven Agencies and Professional Service Firms	British Columbia, Canada
FIRM TYPE	LOCATION
30	**Fully Remote**
STAFF MEMBERS	WORKING TYPE

"We do a lot for our clients, and Financial Cents gives us that pulse check we need to make sure that we're on track and know what's coming up next. It transitions accounting firm owners from a reactive mindset to a planning mindset, ensuring work is defined, planned, and delivered efficiently."

Jessica Wong | FINANCE DIRECTOR, FISCALLY PROFESSIONAL CORPORATION SOLUTIONS LLC

⊗ BEFORE

Fiscally Professional Corporation previously used a generic project management tool to track work, but it functioned more like a simple checklist and was not applied consistently throughout the firm. The tool lacked the necessary structure for accounting workflows, leading to inefficiencies as the firm scaled. While client information was always securely stored, tracking work and requests efficiently remained a challenge.

As the firm grew 4X larger, Jessica and her team recognized that their previous system was no longer adequate. They needed a more robust solution that aligned with their standardized processes in theory but could also be executed effectively in practice.

⊘ AFTER

Financial Cents provided the visibility, structure, and automation needed to keep work streamlined as the firm scaled. The team now tracks work using task pods and dependencies, allowing for greater accountability and clarity. The platform is used beyond daily task management—it has transformed onboarding for both employees and clients, making processes more efficient through workflow templates.

"One of my favorite features is the dependency feature—it allows us to create structured workflows instead of just a series of checklists."

Start a free trial

Uncertainty and Lack of Knowledge:

Several firms are unsure how automation fits their operations or if their processes are ready:

· **"Not sure if it's something we can afford or how to go about it"**

· **"Too many variations in accounting scenarios to automate"**

· **"Older owners are not exploring options"**

Spotlighted Responses:

· **"Nothing has worked the way my brain envisions it." — Anonymous**

· **"We started before, but it got away from us. The job is on me and my hubby, and we both have other responsibilities that take up our time." — Anonymous**

Conclusion:

The barriers to adopting workflow automation fall into five key categories:

1. Cost concerns – Both upfront costs and ongoing expenses are significant deterrents.

2. Time and implementation challenges – Firms feel they cannot pause operations to onboard a new system.

3. Overwhelm from too many choices – Decision fatigue prevents firms from selecting a solution.

4. Uncertainty about readiness – Firms hesitate, believing they need to "fix" internal processes first.

5. Lack of knowledge or leadership buy-in – Some firms lack awareness or struggle with change resistance.

These insights highlight opportunities for vendors and advisors to address concerns by offering:

✅ **Flexible pricing options tailored for small firms.**

✅ **Onboarding support and training resources to reduce overwhelm.**

✅ **Clear comparisons of software options to simplify decision-making.**

✅ **Case studies and readiness assessments to help firms see how automation fits their size and needs.**

With the right support, more firms can overcome these barriers and experience the productivity gains that workflow automation offers.

How Firms Use Workflow Automation Software

The survey reveals how firms leverage workflow automation software to streamline their operations and improve productivity. The top uses emphasize **task management, client communication, and collaboration.**

Key Ways Firms Use Workflow Automation:
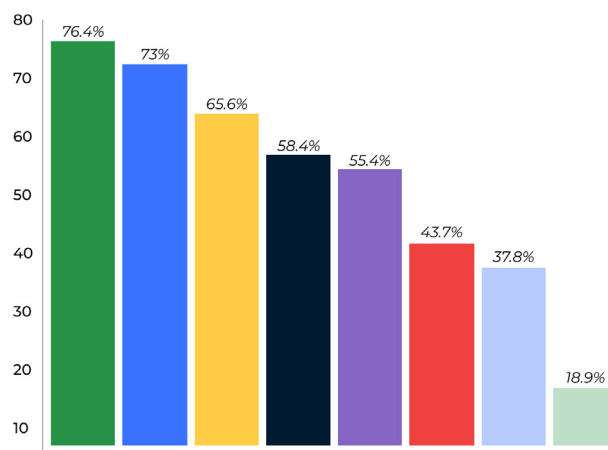
- ● **Updating work status** – The most common use case, helping firms track progress and maintain real-time visibility on tasks and deadlines.

- ● **Getting documents from clients** – Automated client reminders and document portals reduce manual follow-ups and speed up information collection.

- ● **Scheduling and assigning work** – Automation simplifies task delegation, ensuring that work is evenly distributed and deadlines are met.

- ● **Communicating with clients** – Tools like automated reminders, email templates, and client portals enhance client engagement and reduce response times.

- ● **Onboarding new clients** – Automated checklists and welcome sequences help firms streamline their client intake process.

- ● **Collaborating with staff** – Workflow software centralizes communication, making teamwork more efficient and reducing information silos.

- ● **Managing capacity** – Firms use automation to track workloads and allocate resources effectively, preventing burnout and improving productivity.

- ● **Onboarding new staff** – Fewer firms automate staff onboarding, but those that do benefit from structured training workflows and faster employee ramp-up times.

Spotlighted Responses:

- • **"Automating client reminders has saved us hours chasing documents every month."** — Anonymous

- • **"We use automation to assign recurring tasks—no more manual scheduling every month!"** — Anonymous

Conclusion:

The survey highlights that firms primarily use workflow automation for **task management, client interactions, and team collaboration**, with **client and staff onboarding** as areas with room for growth. Firms that fully leverage automation across these areas experience **greater efficiency, fewer missed deadlines, and improved client satisfaction.**

💡 *Financial Cents Platform Insight*💡

50% of firms use workflow automation features in Financial Cents.
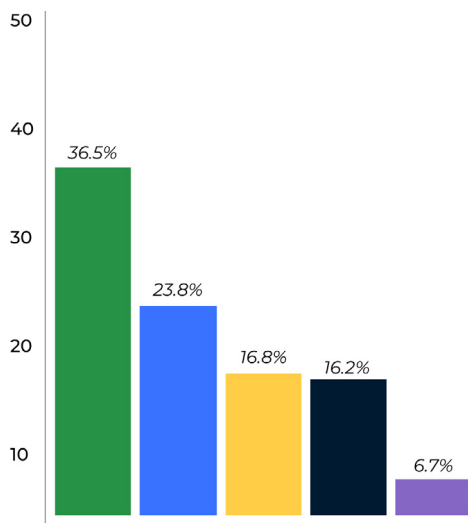
What Firms Hope to Achieve with Workflow Automation

Among those who have not yet adopted workflow automation software, the survey highlights the primary outcomes they hope to achieve. The responses reflect a strong desire for **efficiency, growth, and better collaboration.**

Top Goals for Workflow Automation:

- 🟢 ***Spend less time on work (work-life balance)*** – The top priority for over a third of respondents is to free up time, reduce administrative burdens, and achieve a healthier work-life balance.

- 🔵 ***Scale your firm*** – Nearly a quarter hope that automation will help them grow their firm by handling more clients without increasing headcount.

- 🟡 ***Improve team collaboration*** – Many see automation as a tool to streamline teamwork, reduce miscommunication, and make task handoffs smoother.

- ⚫ ***Reduce errors*** – Respondents value automation's ability to standardize processes, reduce manual data entry, and minimize costly mistakes.

- 🟣 ***Save money*** – A smaller percentage prioritize cost savings, hoping that automation will lower operational costs and increase profitability.

Conclusion:

The survey reveals that most firms view workflow automation as a solution to **improve efficiency, reduce workload, and drive business growth**. While cost savings are a factor, the **human benefits—work-life balance and error reduction—are the most significant motivators**. Firms that adopt automation with these goals in mind are more likely to experience increased productivity, stronger team collaboration, and long-term scalability.

After Workflow Automation

Time Spent Scheduling and Assigning Work Post-Automation:
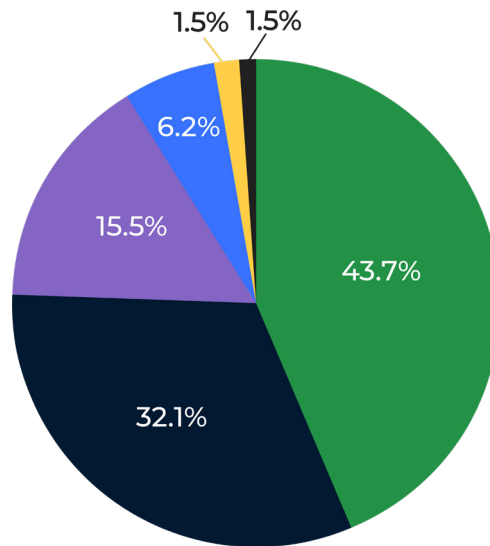
🟢 **0–1 hour** – Nearly half of respondents now spend less than an hour per week on scheduling, showcasing the impact of automated task assignments and recurring workflows.

⬛ **2–5 hours** – A third of respondents spend just a few hours per week, highlighting further efficiency gains from streamlined workflows.

🟣 **Not applicable** – Some respondents have fully automated their scheduling or have different roles that do not involve assigning work.

🔵 **6–10 hours** – A small percentage still spend significant time scheduling, indicating room for further process refinement.

🟡 **10–15 hours (1.1%) and 16+ hours (1.5%)** – Very few respondents continue to spend extended hours on scheduling, which may suggest complex workflows or partial automation.

Before vs. After Comparison: Time Spent on Scheduling Work

Before	*After*
Before implementing workflow automation, no respondents spent less than an hour per week scheduling work.	However, **after automation, 43.7%** of firms reduced their scheduling time to under an hour—a remarkable improvement driven by automated task assignments and recurring workflows.
The percentage of firms spending **2–5 hours per week** scheduling work decreased from **42.7% before automation.**	To **32.1% after automation**, demonstrating further time savings.
A significant shift occurred among those spending **6–10 hours per week**, dropping from **22.9% before.**	**6.2% after automation**, highlighting the efficiency of automated scheduling.
Extended scheduling times were nearly eliminated. Those spending over **10 hours per week** scheduling dropped from **9.1% before automation** (including 5.9% at 10–15 hours and 3.2% at 16+ hours)	To just **2.6% after automation**.

Additionally, 15.5% of respondents reported that scheduling was no longer applicable, indicating that their workflows were fully automated with little to no manual input.

Conclusion:

Workflow automation has delivered **significant time savings**, with over **75% of firms now spending 5 hours or less per week on scheduling and assigning work**, compared to only **42.7% before automation**. This shift highlights how automation reduces administrative burdens, enabling firms to focus more on **client service, team collaboration, and business growth**.

> " Capture relevant data across all work areas, segment data to refine workflows, and centralizing data in a warehouse to drive automation and efficiency. "

IMPROVING WORKFLOW TRANSPARENCY USING DATA:

The best way to improve workflow transparency is by ensuring you're capturing all relevant data points related to the work being accomplished. This includes financial information, task-related data, and time spent by your team. Pulling in elements from all areas impacting the work gives you a clear understanding of the work status and what still needs to be completed.

USING DATA TO REFINE WORKFLOWS OVER TIME:

Data plays a huge role in refining workflows. If you segment workflows by workstream, role, industry, or client, you should collect data relative to each benchmark to better architect your workflow. By cross-referencing workflow data within an industry-specific client base, you can identify bottlenecks and areas where time is spent inefficiently. Harnessing and segmenting this data allows firms to refine workflows for greater efficiency.

— ROMAN VILLARD, CPA
PARTNER AND CEO,
FULL SEND FINANCE

ENSURING DATA IS USED EFFECTIVELY RATHER THAN JUST ACCUMULATED:

The best way to avoid accumulating data debt is to capture all data in a single location that integrates across firm systems. A data warehouse allows you to connect data points, create triggers, and take action based on aggregated insights. When adopting automation, it's crucial to pull data from a single source to avoid friction and quality issues. Centralizing data and creating triggers based on movement within the warehouse ensures data is actionable rather than overwhelming.
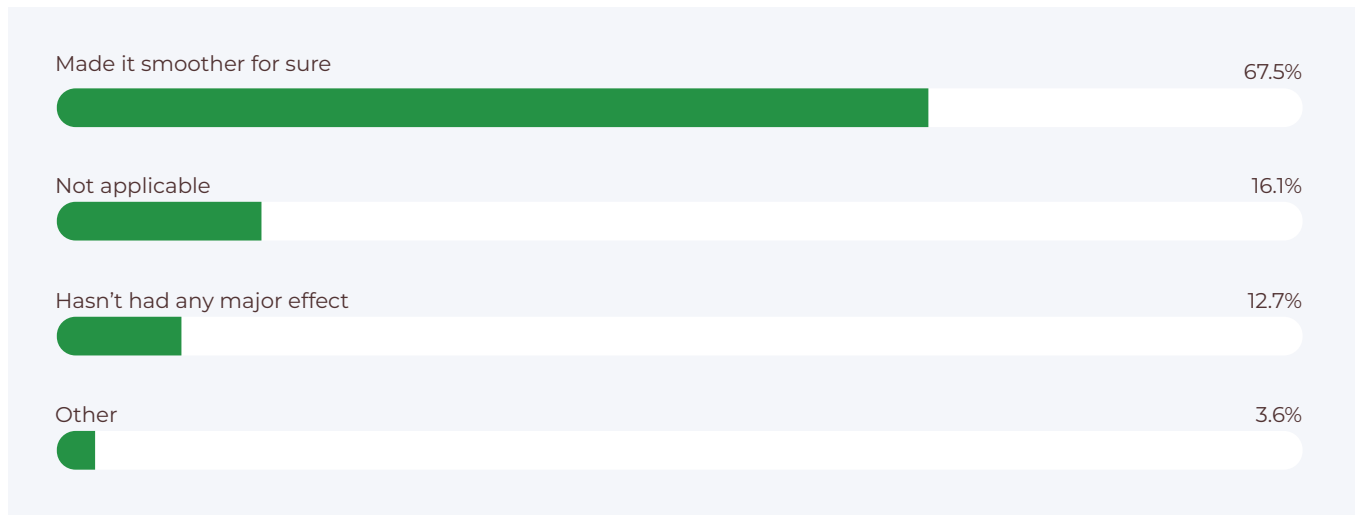
# The Impact of Workflow Automation on Client and Staff Onboarding

The survey highlights the impact of workflow automation software on firms' client and staff onboarding processes. While most firms have seen improvements, some are still refining their systems to achieve smoother operations.

Impact on Onboarding Processes:

Made it smoother for sure   67.5%

Not applicable   16.1%

Hasn't had any major effect   12.7%

Other   3.6%

Before vs. After Comparison: Onboarding Process Efficiency

Before implementing workflow automation, **onboarding processes were often manual, inconsistent, and time-consuming**, with many firms struggling to maintain a clear, repeatable process for both clients and staff. After automation:
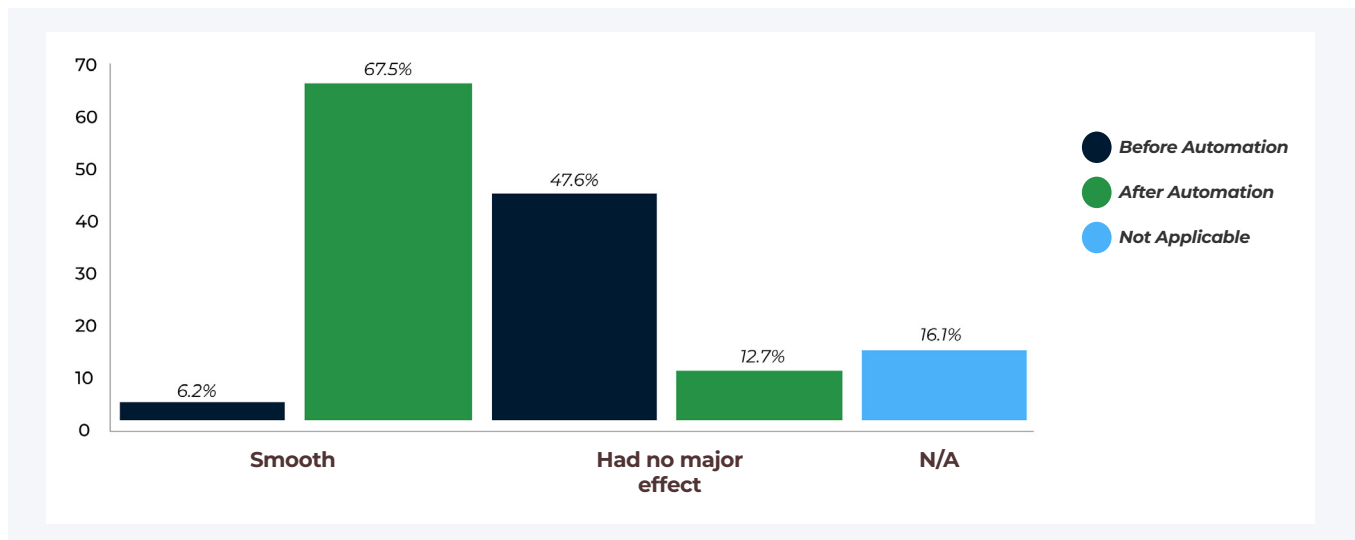
- The percentage of firms describing their onboarding as **"smooth"** rose from **6.2% (before automation) to 67.5% (after automation)**—a significant leap in efficiency and client experience.

- Conversely, those reporting that onboarding **"had no major effect"** or remained **"clunky"** dropped from **47.6% (before automation) to just 12.7% (after automation)**.

- A notable **16.1% found onboarding automation not applicable**, likely due to the nature of their services or roles.

Spotlighted Responses:

- "Somewhat improved. Still refining the process."

- "Scheduling discovery calls is much easier, but I still need to automate proposals and onboarding tasks."

- "Better in some ways, but training them on the PM software is time-consuming in and of itself."

- "I put so much time into the workflow setup and have to constantly adjust. Some things flow easily for sure, but I would still call the whole process clunky."

Conclusion:

Workflow automation has driven **substantial improvements** in client and staff onboarding processes, with over **67.5% of firms** experiencing **a smoother, more organized process** compared to their pre-automation methods. However, the **spotlighted responses** indicate that **onboarding remains a work in progress** for some firms, with challenges such as **process refinement, training, and software learning curves.**

The takeaway: While automation can **significantly streamline onboarding**, firms that combine **continuous process improvement with training and software optimization** see the greatest results.

> " Lack of a standardized process leads to inefficiencies and confusion."

BIGGEST ONBOARDING MISTAKE & FIX:

Lack of a standardized process leads to inefficiencies and confusion. We refined our system to ensure a seamless client experience while maintaining team efficiency.

BALANCING AUTOMATION & HUMAN TOUCH:

Automation handles admin tasks like email templates for inquiries, follow-ups, and engagement letters, notifications for document uploads, and auto-generating tasks in Financial Cents when a client signs and pays. Recurring tasks keep bookkeeping clients on track. Human interaction remains essential with personalized Loom videos in onboarding emails, live video calls, and email or video responses for complex questions.

ONE KEY ONBOARDING IMPROVEMENT:

Setting clear boundaries and standardizing processes helps reduce inefficiencies and frustration. We enforce this by requiring digital-only document uploads (paper incurs a fee), using Calendly for scheduling instead of back-and-forth emails, limiting calls to scheduled appointments, and ensuring pricing transparency with digital agreements.

**-NICK BOSCIA, CPA, EA**
MANAGING PARTNER, BOSCIA & BOSCIA PC

The Impact of Workflow Automation on Firm Collaboration

Impact on Collaboration:

Very collaborative   37.6%

Somewhat collaborative   33.3%

Not applicable   25.9%

Not collaborative at all   3.2%

Before vs. After Comparison: Firm Collaboration

Before workflow automation, collaboration was often limited by **manual processes, scattered communication, and unclear task ownership**. After automation:
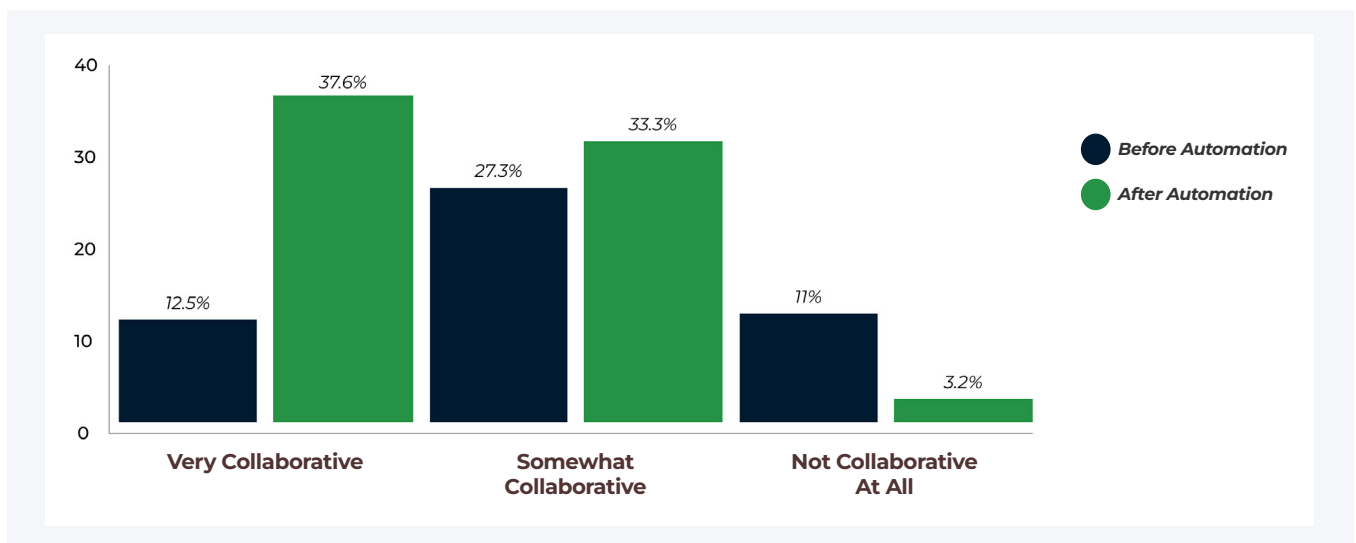
- The percentage of firms describing their collaboration as **"very collaborative"** jumped from an estimated **12.5% (before automation) to 37.6% (after automation)**.

- The group describing collaboration as **"somewhat collaborative"** increased from 2**7.3% (before automation) to 33.3% (after automation)**, showing incremental gains from task tracking and shared workflows.

- The percentage of firms stating they were **"not collaborative at all"** dropped from **11% (before automation) to just 3.2% (after automation)**—a significant improvement.

Case Study

How Financial Cents Empowered Full Send Finance to Achieve 150% Growth in One Year

FULL SEND FINANCE

Full-cycle accounting through CFO services for early-stage and growth companies
FIRM TYPE

Boulder, Colorado
LOCATION

9
STAFF MEMBERS

July 12, 2023
FC START DATE

2022
YEAR FOUNDED

"We wanted a software solution that could scale with us. I like Financial Cents because it targets the accounting industry. The nuances of recurring work, task dependencies, and client requests made a lot of sense for us."

Stacey Feldman, CPA | CHIEF OPERATING OFFICER AT FULL SEND FINANCE

❌ BEFORE

Full Send Finance initially utilized Teamwork for practice management, which sufficed when managing a limited client base. However, as the firm expanded, Teamwork's lack of accounting-specific features became a bottleneck, hindering scalability and efficiency.

✅ AFTER

Transitioning to Financial Cents provided Full Send Finance with a platform tailored to the accounting industry's unique requirements. Features such as recurring work management, task dependencies, and streamlined client requests aligned seamlessly with the firm's operations, supporting their substantial growth.

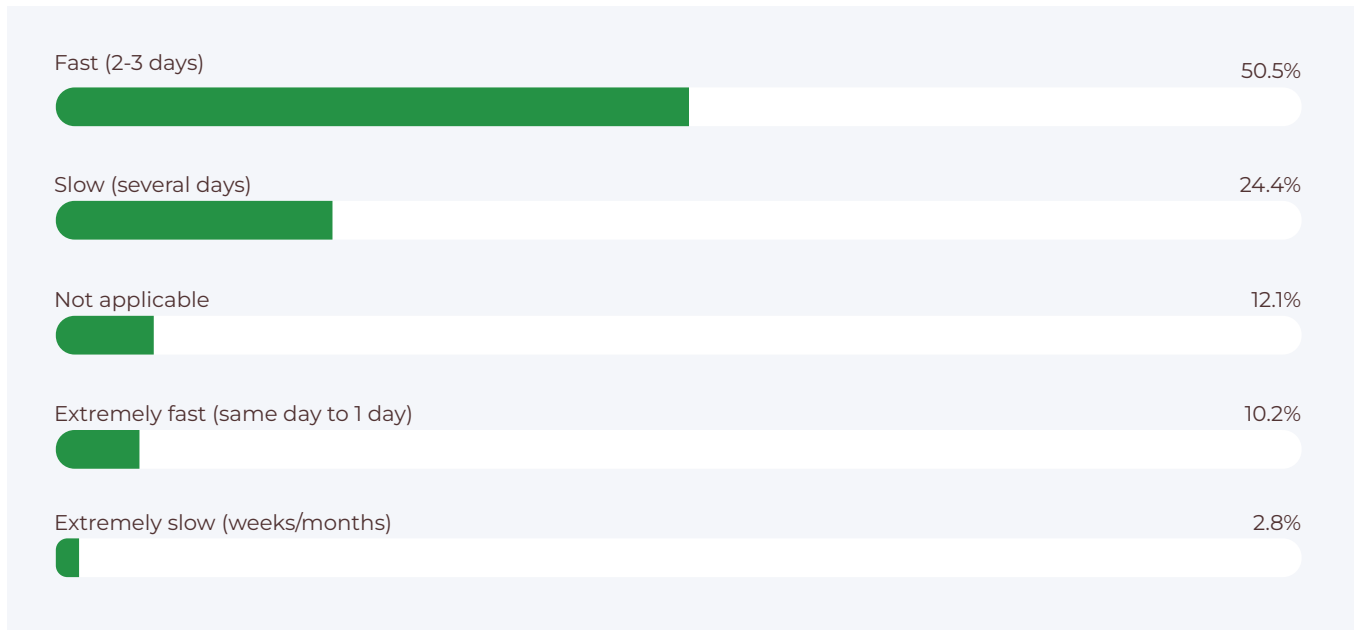**Read the case study**   **Start a free trial**

Conclusion:

Workflow automation has significantly enhanced collaboration within firms, with **over 70% of respondents** (combined "Very" and "Somewhat" collaborative) seeing improvements compared to pre-automation processes. The software's ability to **centralize tasks, improve visibility, and streamline team communication** is key to these gains. However, the **25.9% "Not applicable"** group highlights that collaboration-focused automation may not apply to all firms, especially those with solo practitioners or less team-based structures.

Overall, workflow automation proves to be a powerful tool for boosting team collaboration, provided firms fully integrate it into their processes and workflows.

The Impact of Workflow Automation on Client Document Collection

Impact on Client Document Collection Times:

Fast (2-3 days) — 50.5%

Slow (several days) — 24.4%

Not applicable — 12.1%

Extremely fast (same day to 1 day) — 10.2%

Extremely slow (weeks/months) — 2.8%

Before vs. After Comparison: Document Collection Speed

Before automation, **delays in receiving client documents were a major bottleneck**, with most firms waiting several days or even weeks. After implementing workflow automation:
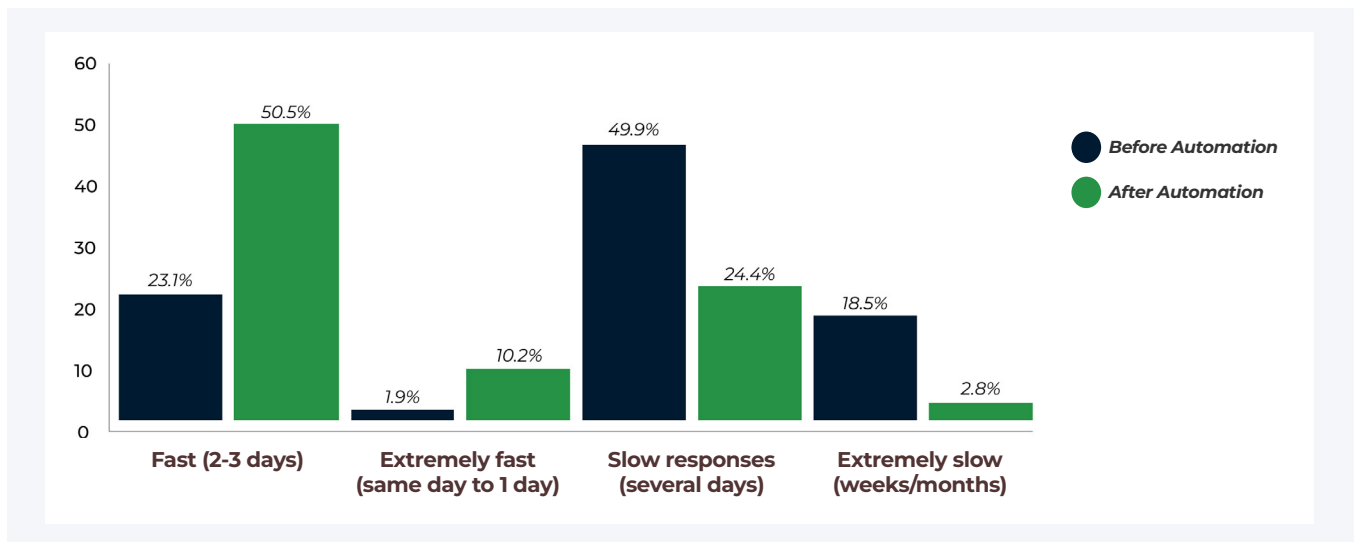
- The percentage of firms receiving documents within **2–3 days** rose from **23.1% (before automation) to 50.5% (after automation)**—a 27.4% improvement.

- Firms experiencing **extremely fast (same-day to 1 day)** responses more than **quadrupled, from 1.9% (before) to 10.2% (after automation)**.

- Those reporting **slow responses (several days)** dropped from 4**9.9% (before automation) to 24.4% (after automation)**—a significant reduction.

- The number of firms facing **extremely slow (weeks/months)** responses decreased from **18.5% (before) to 2.8% (after automation)**—an improvement of over 15 percentage points.

Conclusion:

Workflow automation has **significantly accelerated client document collection**, with **60.7% of firms now receiving documents within 1 to 3 days**, compared to just **25% before automation**. The results emphasize that **automated client reminders, client portals, and recurring requests** play a crucial role in reducing delays.

However, the **24.4% still experiencing slow responses** highlights that while automation improves the process, **client behavior and engagement remain critical factors**. Firms can further address this by:

☑ Automating reminders with deadlines

☑ Using client-friendly submission portals

☑ Incentivizing faster responses

Overall, workflow automation has proven to be a game-changer in document collection, delivering both speed and efficiency.

💡 *Financial Cents Platform Insight* 💡
The average time for clients to submit requested documents is 5 days across firms on the scale plan:
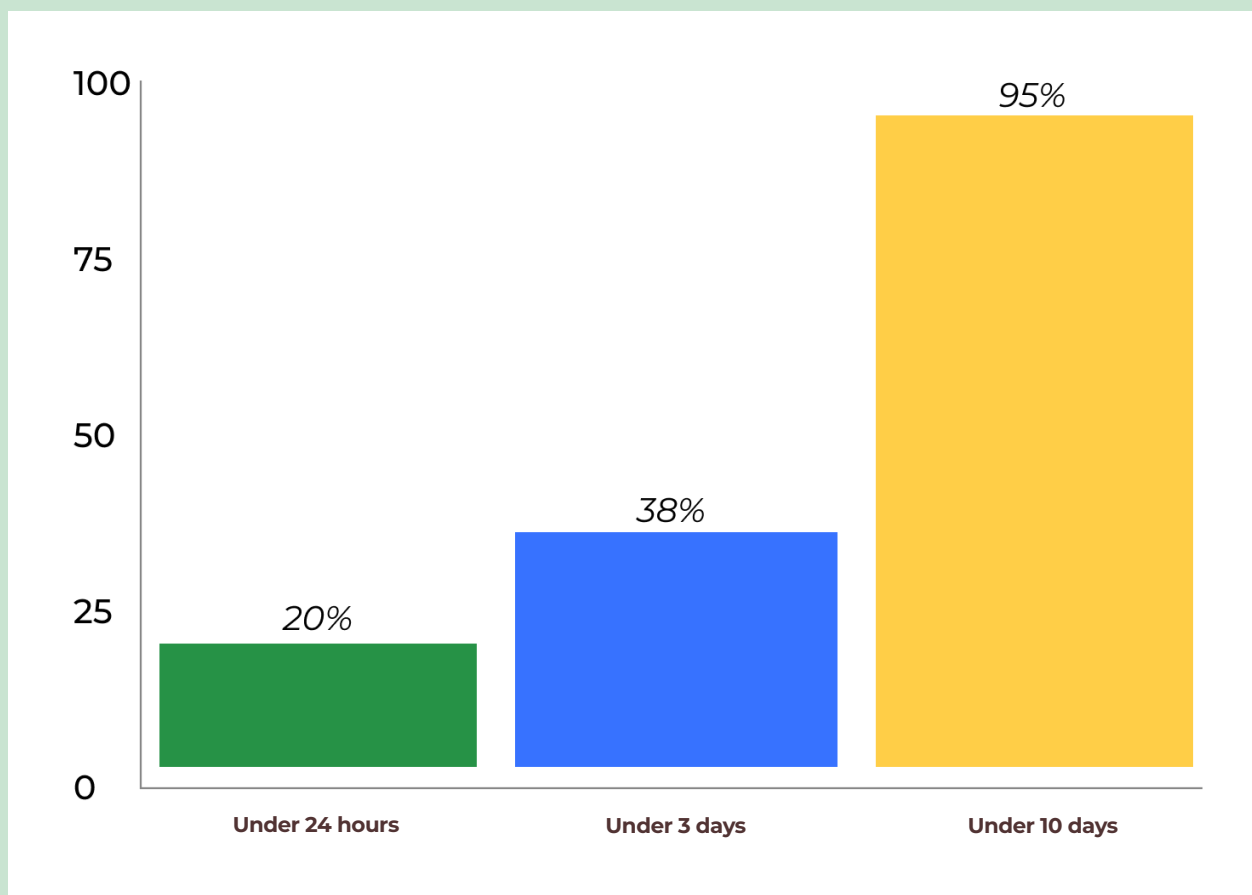
The Biggest Impact Workflow Automation Software Has Had on Firms

The survey highlights the most significant benefits firms have experienced since implementing workflow automation. The responses emphasize improvements in **process efficiency, speed, collaboration, and client interactions.**

Top Areas of Impact:
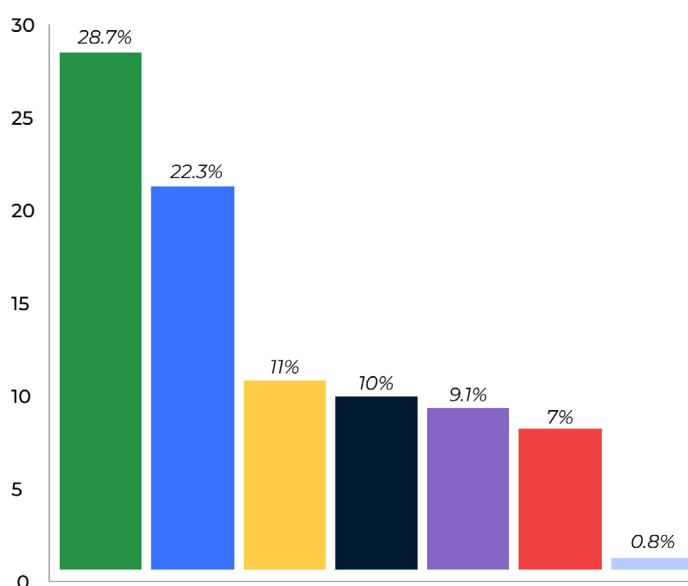
● **Better standardized systems and processes (28.7)** – The most cited benefit, with nearly a third of respondents stating that automation has helped them **streamline workflows, create consistency, and reduce errors.**

● **Getting work done faster (22.3%) –** Over a fifth of respondents found that automation significantly accelerated their **task completion rates**, freeing up time for high-value activities.

● **Improved team collaboration (11%)** – Many firms reported that automated workflows enhanced **visibility, accountability, and teamwork,** reducing confusion and bottlenecks.

● **Faster document collection from clients (10%)** – Automation tools such as **client portals and automated reminders** helped firms collect documents **more quickly and with less follow-up.**

● **Meeting deadlines faster (9.1%)** – Automation provided better tracking and reminders, ensuring **tasks were completed on time and deadlines were met.**

● **Saving time (7%) –** Respondents valued automation's ability to reduce time spent on manual tasks and repetitive processes.

● **Saving money (0.8%)** – A few respondents cited **cost savings** from reduced labor hours and increased operational efficiency.

Limited or No Impact:

- **Not applicable (6.4%)** – Some respondents indicated that automation did not apply to their specific workflows.

- **No major impact (2.5%)** – A small percentage reported minimal or no improvement, suggesting implementation issues or low adoption rates.

Spotlighted Responses:

- "It has helped us to implement better standardized systems and processes. We now have clear workflows that everyone follows."

- "Getting documents from clients is so much easier with automated reminders. It's saved us hours of follow-up."

Before vs. After Comparison: Document Collection Speed

Before workflow automation, firms faced **inconsistent processes, slow task completion, poor collaboration, and frequent deadline issues**. After automation:
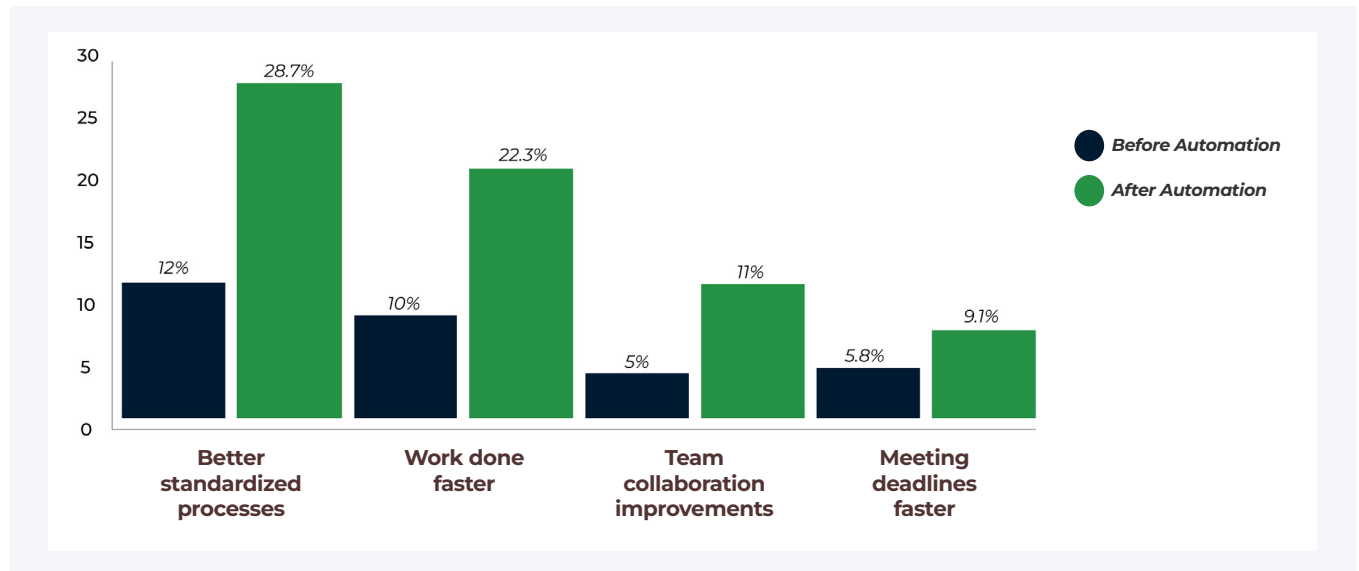

Conclusion:

The biggest impacts of workflow automation have been in **standardizing processes, accelerating work completion, and improving collaboration**. With over **60% of firms experiencing gains in speed, efficiency, and consistency,** automation has become a **key driver of productivity.**

However, **2.5% of firms** reported **no major impact,** signaling opportunities for **better onboarding, training, or workflow optimization**. Overall, the data highlights that w**hen properly implemented and adopted, workflow automation delivers measurable improvements in firm operations and client service**.

💡 *Financial Cents Platform Insight* 💡

*Highest engagement features in Financial Cents include:*
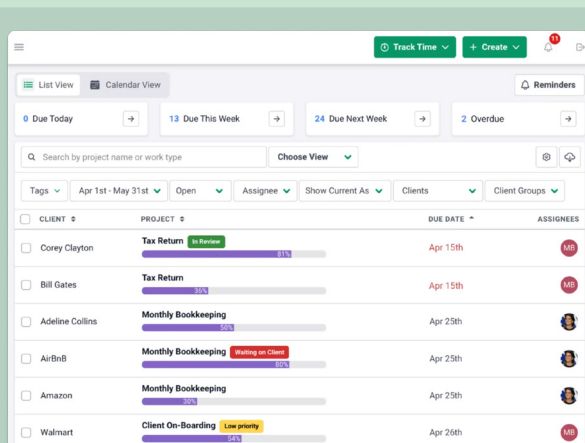
The Workflow Dashboard is the most visited page

- Bulk creating projects for many clients from a workflow template

- Marking tasks completed

- Syncing clients and time entries with QuickBooks Online

- Email automations including auto-linking emails to client profiles and creating projects from emails

- Time tracking reports

Firms Plan to Increase Workflow Automation Next Year

The survey reveals strong interest among firms in expanding their use of workflow automation in the coming year:
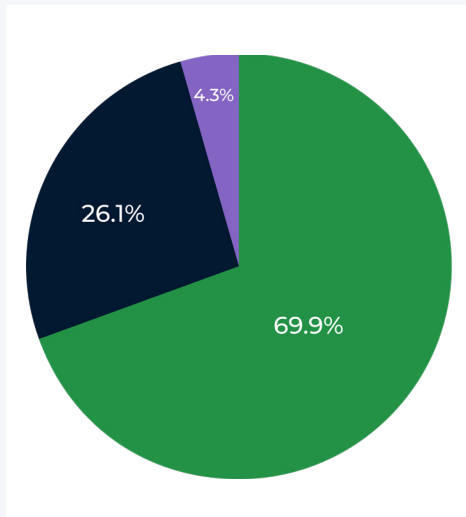

Yes (69.6%) – A significant majority plan to increase their use of workflow automation, reflecting confidence in its ability to improve efficiency, collaboration, and client service.

Unsure (26.1%) – Over a quarter are uncertain, indicating that some firms may still be evaluating their needs, assessing software options, or determining the return on investment.

No (4.3%) – A small percentage have no plans to increase automation, possibly due to satisfaction with their current systems or concerns about cost and implementation complexity.

Insight:

With nearly **70% of firms planning to expand their use of automation**, the trend toward d**igitizing workflows, streamlining operations, and improving efficienc**y is clear. However, **over a quarter remain on the fence**, signaling an opportunity for vendors to provide more **education, case studies, and support** to help firms maximize their automation potential.

💡 *Financial Cents Platform Insight* 💡
The adoption of automation increased by 39% to 50% of firms between 2023 and 2024.
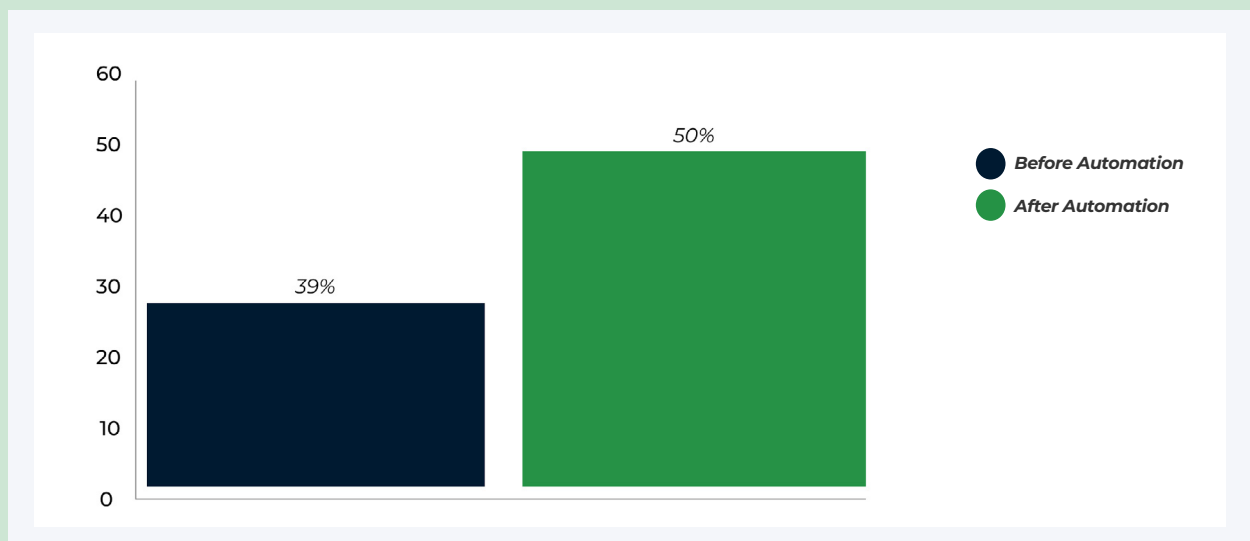
Key Features Firms Consider When Choosing a Workflow Management Solution

The survey reveals the most important features firms prioritize when selecting a workflow management solution. The results highlight a strong focus on **visibility, client management, and automation.**

Top Features Considered:
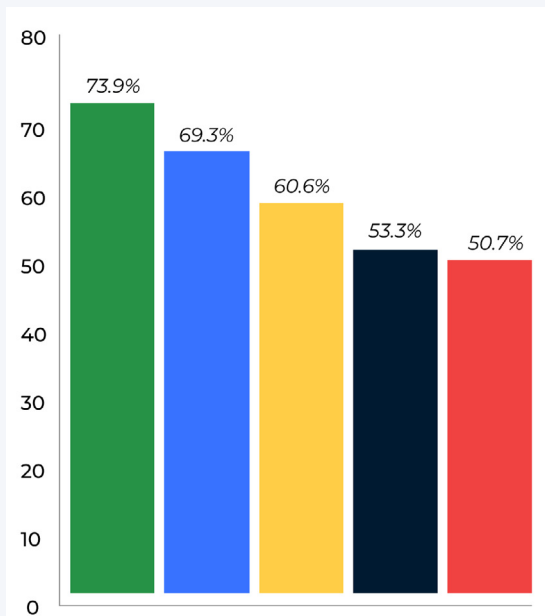
● **Workflow dashboard with a bird's eye view of work status (73.9%)** – The most critical feature, enabling firms to track work progress, deadlines, and team activity at a glance.

● **Client tasks and reminders (69.3%)** – Automated client follow-ups and task requests are essential for reducing delays and ensuring timely document collection.

● **Client portal (60.6%)** – A dedicated client space for document uploads and communications is key for enhancing the client experience and reducing email clutter.

● **Email integration (53.3%)** – Seamless integration with email platforms helps firms centralize communication and manage tasks directly from their inboxes.

● **Recurring projects (50.7%)** – Automation of repetitive tasks saves time and ensures consistency in recurring work such as monthly bookkeeping or payroll.

Collaboration and Reporting Features:

● **Team-to-client communication (40.9%)** – Direct communication tools within the platform improve collaboration and streamline updates between clients and team members.

● **Task dependencies (38.6%)** – Critical for ensuring that projects progress in the correct sequence, reducing bottlenecks and missed steps.

● **Team and activity reports (38.6%)** – Reporting features help firms analyze productivity, monitor deadlines, and assess team performance.

● **Team collaboration and chat (34.2%)** – Built-in chat and collaboration tools support real-time discussions and reduce reliance on external messaging apps.
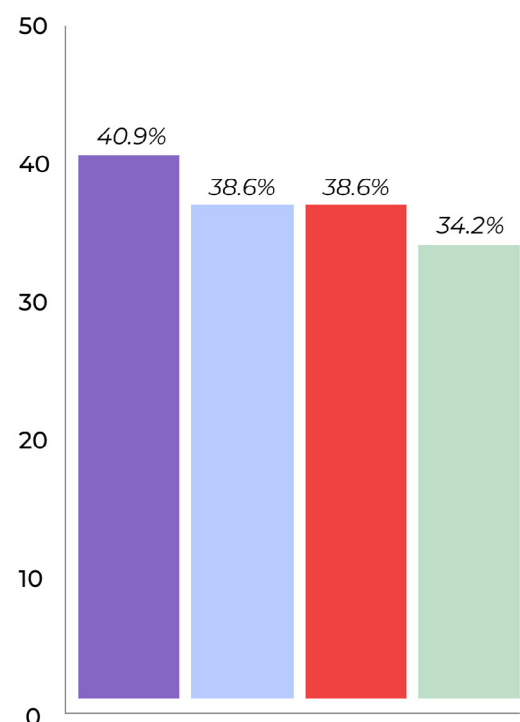
Insight:

The data highlights that firms prioritize features that improve **visibility, automate repetitive tasks, and streamline client communications**. However, **collaborative tools like team chat and reporting features rank lower**, suggesting that many firms may **still rely on external tools for internal communication and performance tracking.**

To meet these needs, workflow management solutions should:

✅ Offer a comprehensive dashboard with real-time task tracking.

✅ Provide robust client-facing tools, including reminders and portals.

✅ Automate recurring workflows and include task dependencies.

✅ Integrate with email platforms for seamless task management.

With these features in place, firms can **achieve greater efficiency, reduce errors, and enhance both team and client experiences.**

💡 *Financial Cents Platform Insight*💡

80% completion rate on automated document requests.

"Firms need to be very intentional about tech adoption."

HOW TO EVALUATE WHICH NEW TECHNOLOGIES OR TOOLS ARE WORTH ADOPTING:

We hesitate to add new tech if we don't have a problem it solves. Just because it's the app de jour with our friends doesn't mean we even look at it if it isn't solving a problem—and worse, if it could disrupt systems and apps that are already working well.

MOST EFFECTIVE STRATEGIES FOR OPTIMIZING WORKFLOWS:

We decide what is an SOP vs. a workflow, so we don't overburden workflows with too much information. We link back to the process doc in a workflow, but things like a naming convention are an SOP, while a task with a best practice (e.g., AP aging overdue date range to scan for) belongs in a workflow.

- KELLIE PARKS, CPB
OWNER, CALMWATERS CLOUD ACCOUNTING

UNIQUE WORKFLOW CHALLENGES IN MANAGING A SMALL, LIFESTYLE FIRM AND HOW TO ADDRESS THEM:

Thinking that you don't need to document your processes because you (and possibly a few part-timers) know how to do everything anyway. And believing you don't need an app to manage work or client relationships. This is counterproductive—documenting processes in an app and communicating with clients there ensures efficiency, consistency, and automation, ultimately giving you more freedom to enjoy the lifestyle aspect of your firm.

Most Important Factors Driving Firms' Decisions to Adopt New Software

The survey highlights the key factors that influence firms when deciding to adopt new software solutions. The results emphasize that **cost-effectiveness and usability** are top priorities, while factors like **peer recommendations and vendor reputation** carry less weight.

Top Decision Drivers:
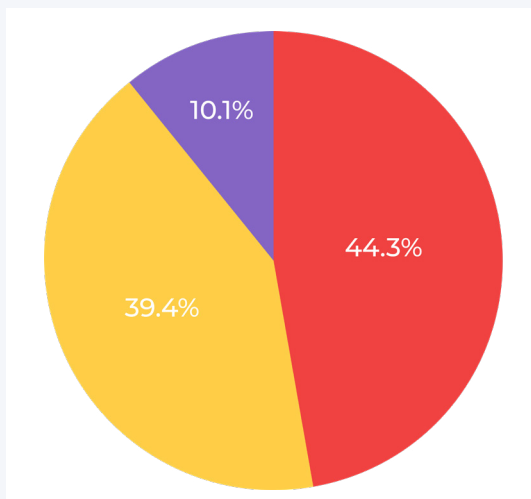
🔴 **Cost (44.3%)** – Nearly half of respondents rank cost as the most critical factor, indicating that budget considerations and pricing models are major influences in their software choices.

🟡 **Ease of use (39.4%)** – The second most important factor, showing that firms highly value **intuitive interfaces, user-friendly workflows, and minimal learning curves.**

🟣 **Integration capabilities (10.1%)** – A smaller portion prioritize **how well the software integrates with their existing tools** (e.g., accounting software, email, and client portals), reflecting a focus on operational efficiency.

Less Critical Decision Drivers:

Recommendations from peers (4.1%) – Peer input has relatively low influence, suggesting that **firms rely more on their own evaluations or internal needs assessments** than on word-of-mouth.

Vendor reputation (2%) – Brand recognition and reputation carry minimal weight, highlighting that firms prioritize **functionality, cost, and usability over name recognition.**

Insight:

The findings show that firms make software decisions based primarily on **practical value and ease of implementation**. Vendors aiming to attract these firms should:

✅ *Offer competitive pricing* with clear ROI demonstrations.

✅ Emphasize *intuitive design and user experience* during demos and trials.

✅ Provide *seamless integrations* with existing tools to avoid workflow disruptions.

✅ Highlight *peer success stories and case studies* to bridge the gap where recommendations fall short.

In conclusion: While cost leads the decision-making process, firms are most likely to commit to software that offers a **balance of affordability, ease of use, and operational compatibility**.

How Firms Measure the Effectiveness of Workflow Automation

Case Study

How Financial Cents Keeps Accounting Therapy Organized and Efficient

ACCOUNTING THERAPY, INC

Bookkeeping and QuickBooks Support
FIRM TYPE

Los Angeles, California, USA
LOCATION

9
STAFF MEMBERS

Fully Remote
WORKING STYLE

1996
YEAR FOUNDED

"It took us a while to find a fitting practice management software. Shahram's (Financial Cents' CEO) webinar with Roundtable Labs convinced me that Financial Cents was what we needed. The webinar showed Shahram's desire to solve all the problems of the accounting world."

Alexis Sadler | CEO OF ACCOUNTING THERAPY, INC.

❌ BEFORE

Founded in 1996, Accounting Therapy aimed to support business owners by managing their accounting systems, allowing them to focus on their core operations. With team members spread across Arizona, New Jersey, South Carolina, Tennessee, and Wyoming, maintaining efficient workflows was crucial.

"Before Financial Cents, what we were using wasn't as user-friendly, and importing time into QuickBooks failed every single time. That was our trigger to look for something else." — Alexis Sadler

✓ AFTER

Transitioning to Financial Cents addressed these issues effectively:

• **Standardized Processes:** The firm implemented projects for every process, optimizing workflows and ensuring consistent work quality.

• **Enhanced Visibility:** Financial Cents became the single source of truth, allowing the team to track everything from projects to administrative tasks, marketing, and meetings. This comprehensive tracking freed up leadership to focus on growth-oriented tasks.

"Our major benefit from Financial Cents is the ability to implement a project in Financial Cents for every single process in our business."

Read the case study   **Start a free trial**

77

The survey highlights the key metrics firms use to evaluate the success of their workflow automation. The responses show that firms prioritize **operational efficiency, client satisfaction, and meeting deadlines** as primary indicators of effectiveness.

Top Metrics for Measuring Effectiveness:
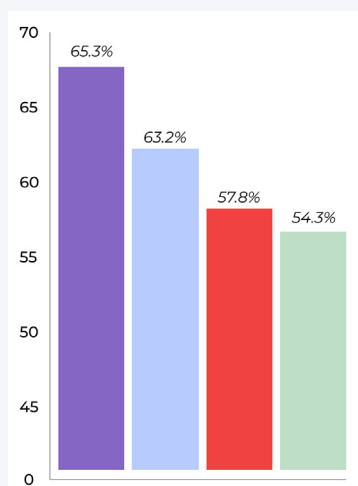
Systems and processes that run smoothly (65.3%) – The most common measure of success, reflecting the importance of **process standardization, reduced errors, and consistent workflows.**

Time saved on manual work (63.2%) – A key performance indicator, emphasizing how automation helps **reduce repetitive tasks and free up time for higher-value work.**

Happy and satisfied clients (57.8%) – Over half of firms measure success by improvements in **client experience, faster turnaround times, and reduced friction in communication.**

Meeting deadlines (54.3%) – Automation's impact o**n on-time project delivery** is a critical factor in evaluating its effectiveness.

Secondary Metrics:

- **Peace of mind (48.5%)** – Nearly half of respondents value the stress reduction and operational clarity that comes from well-automated workflows.
- **Excellent team collaboration (27%)** – Some firms measure how automation improves internal teamwork, communication, and accountability.
- **Improved bottom line (26.7%)** – A smaller but important segment evaluates success based on financial performance and profitability.
- **Team collaboration and chat (34.2%)** – Built-in chat and collaboration tools support real-time discussions and reduce reliance on external messaging apps.

Minimal Impact:

- **Not applicable (5%)** – A small group indicates that **automation metrics are either not tracked or irrelevant to their current operations.**

Insight:

The results highlight that firms define workflow automation success through a mix of **operational efficiency, client outcomes, and employee satisfaction:**

✅ **Efficiency-focused metrics (smooth processes, time savings, deadlines) dominate.**

✅ **Client satisfaction and peace of mind are highly valued intangible benefits.**

✅ **Collaboration and profitability are secondary but still important indicators.**

Conclusion: Firms view workflow automation as a tool to **streamline operations, improve client experiences, and reduce stress,** with financial returns considered **an important but not primary indicator of success.**

"AI is not a plug-and-play solution, it requires human oversight."

ADVICE FOR FIRMS LOOKING TO TAKE THEIR FIRST STEPS INTO AI-DRIVEN AUTOMATION?

Honestly, diving into AI workflow automation can feel pretty daunting if you don't have proper checks and balances in place. When I think about AI-driven automation, I'm picturing a system that kicks off processes like interpreting data or classifying information. But proper checks and balances are key. The safest approach is to build in a "human in the loop" function to ensure you're not relying blindly on the tech.

The safest approach is to always build in a "human in the loop" function. That means before any AI-generated result is finalized, someone reviews it, gives feedback, or approves it. This keeps things safe and ensures you're not relying blindly on the tech.

WHAT'S THE BIGGEST MISCONCEPTION ABOUT AI'S ROLE IN WORKFLOW AUTOMATION?

I think the biggest misconception is that implementing AI in workflow automation is easy.

A lot of people worry that AI is going to take over the decision-making completely, but that's not necessarily the case. I'd argue that deciding what to use AI on requires real expertise.

Traditional rule-based automation typically follows a set script, however introducing AI that learns from data, can act in unpredictable ways and sometimes do more than asked means it needs careful handling.

The idea isn't to hand over all the thinking to a machine, but to use AI as a tool that works alongside skilled professionals who know how to manage the risks. It takes a smart person to implement AI safely (today anyway), so don't expect a magic solution that eliminates the need for human oversight in your own processes (yet).

-CHAD DAVIS
CO-FOUNDER OF LIVECA LLP & AUTOMATIONTOWN.IO

HOW FIRMS SHOULD PREPARE FOR AI SHAPING WORKFLOW MANAGEMENT IN THE NEXT FIVE YEARS

At the insane speed of change right now, I'm not sure we should be listening to anyone who claims they know what's going to happen in five years. I'm having a hard time keeping up with things that happen on a daily basis in this space. That's why I'm incredibly bullish on the power of communities and is why AutomationTown.io was created.

When it comes to using AI for reviewing, creating, or tweaking workflows, you need a solid understanding of the process. My advice is to document why each process exists and how it ties into bigger picture company goals. By clearly explaining a workflow, its purpose and its impact on success you'll be well-prepared to work with both the tools we have today and the new generations of tools that come in the future.

Accounting Workflow Automation Ideas Library

Client Management & Communication

1. Automating Client Document Requests & Follow-ups

- ◆ *Problem*: Chasing clients for documents is time-consuming.
- ◆ *Solution*: Automate document requests and reminders.

🔧 **Tools**: Financial Cents + Gmail/Outlook

1. **Trigger**: Set up a client task in Financial Cents that automatically triggers when a document is required from a client.

2. **Automated Reminders**: Schedule follow-ups at 3, 7, and 14 days.

3. **Completion Notification**: Financial Cents updates and notifies the team when the document is received.

2. AI-Powered Tax Q&A Bot for Clients

- ◆ *Problem*: Clients ask repetitive tax-related questions.
- ◆ *Solution*: Use ChatGPT as a tax FAQ bot.

🔧 **Tools**: ChatGPT + Zapier + Slack/Email

1. **Train ChatGPT**: Upload common tax Q&As.

2. **Integration**: Connect ChatGPT with Slack/Email for instant responses.

3. **Escalation**: Complex inquiries route to a team member automatically.

3. Automating Client Onboarding Workflows

- ◆ *Problem*: Onboarding takes too much time.
- ◆ *Solution*: Automate the onboarding process with checklists.

🔧 **Tools**: Financial Cents + Zapier + Google Forms

1. **Form Submission**: Clients complete an onboarding form.

2. **Workflow Trigger:** Zapier auto-creates a client record in Financial Cents.

3. **Task Assignment:** Financial Cents assigns checklist items to staff.

4. Automating Recurring Monthly Bookkeeping Tasks

- ◆ *Problem*: Recurring bookkeeping tasks are manually scheduled.
- ◆ *Solution*: Automate task creation and tracking.

🔧 **Tools**: Financial Cents + QuickBooks + Zapier

1. **Recurring Task Setup:** Financial Cents schedules monthly bookkeeping workflows.

2. **Integration with QuickBooks:** Auto-pull financial data into workflows.

3. **Completion Alerts:** Notify managers when tasks are done.

Client Management & Communication

5. Automating Invoice & Payment Reminders

- *Problem*: Following up on unpaid invoices takes effort.
- *Solution*: Automate reminders.

🔧 **Tools**: QuickBooks/Xero + Zapier + Gmail/Outlook

1. **Trigger:** Invoice is due in *QuickBooks/Xero.*

2. **Reminder Sequence:** Send escalating reminders (3 days before, 1 day after, 7 days after due date).

3. **Escalation:** Overdue invoices trigger a task in Financial Cents.

6. Automating Client Meeting Scheduling

- *Problem*: Clients send multiple emails to book a meeting.
- *Solution*: Use Calendly for self-booking.

🔧 **Tools**: Calendly + Zapier + Google Calendar

1. **Set Up Calendly:** Create appointment slots.

2. **Zapier Trigger:** Bookings auto-update Google Calendar and Financial Cents.

3. **Reminders:** Auto-send confirmation and reminder emails.

7. Automating Year-End Tax Prep Reminders

- *Problem*: Clients delay sending tax documents.
- *Solution*: Use automated email and SMS reminders.

🔧 **Tools**: Financial Cents + Zapier + SMS/Email

1. **Bulk Client Upload:** List all tax clients in Financial Cents.

2. **Reminder Sequence:** Send automated reminders at key intervals.

3. **Task Completion Tracking:** Financial Cents updates document submission status.

Team & Workflow Management

8. Automating Team Workload Distribution

- ◆ *Problem*: Tasks are not evenly distributed among staff.
- ◆ *Solution*: Use automation to balance workloads.

🔧 **Tools**: Financial Cents + Zapier + Slack

1. **Trigger**: When new tasks are created, Zapier checks workload balance.

2. **Auto-Assignment:** Assign tasks to the team member with the least workload.

3. **Notifications**: Slack alerts assigned team members.

9. Automating Time-Tracking for Client Projects

- ◆ *Problem*: Manual time tracking leads to errors.
- ◆ *Solution*: Automate time tracking with Toggl.

🔧 **Tools**: Toggl + Zapier + QuickBooks

1. **Toggl Integration**: Sync time entries with QuickBooks for invoicing.

2. **Weekly Reports:** Zapier sends a time-tracking summary to the team.

3. **Overage Alerts**: Alert staff when hours exceed estimates.

10. Automating Deadline Tracking & Alerts

- ◆ *Problem*: Missed deadlines lead to penalties.
- ◆ *Solution*: Automate deadline reminders.

🔧 **Tools**: Financial Cents + Zapier + Slack

1. **Input Deadlines:** Add key deadlines for each client.

2. **Automated Alerts:** Notify staff *7 days, 3 days, and 1 day* before deadlines.

3. **Client Reminders:** If docs aren't received, send a follow-up email.

11. Automating Staff Onboarding & Training

- ◆ *Problem*: Training new staff is inconsistent.
- ◆ *Solution*: Automate onboarding workflows.

🔧 **Tools**: Financial Cents + Loom + Zapier

1. **Trigger:** New hire joins.

2. **Auto-Assign Training:** Zapier sends video tutorials and training tasks.

3. **Progress Tracking:** Monitor completion in Financial Cents.

12. Automating Staff Performance Reviews

- ◆ *Problem*: Performance tracking is manual and subjective.
- ◆ *Solution*: Automate data collection and feedback.

🔧 **Tools**: Google Forms + Zapier + Slack

1. **Quarterly Survey:** Staff completes self-assessment.
2. **Auto-Compile Results:** Responses sync to a tracking spreadsheet.
3. **Schedule Reviews:** Manager gets an alert to schedule reviews.

Advanced Automations

13. AI-Powered Email Summarization

- *Problem*: Long client emails take too much time to read.
- *Solution*: Use ChatGPT to generate summaries.

🔧 **Tools**: ChatGPT + Zapier + Gmail

1. **Trigger**: New client email arrives.

2. **ChatGPT Summarizes:** Auto-generate a brief summary and action points.

3. **Send to Slack:** Post summary in Slack for quick review.

14. Automating Expense Categorization

- *Problem*: Manual expense sorting takes too much time.
- *Solution*: Automate with AI-powered tagging.

🔧 **Tools**: QuickBooks + Zapier + ChatGPT

1. **Trigger:** New transaction in QuickBooks.

2. **AI Categorization:** ChatGPT suggests categories.

3. **Approval Workflow:** Zapier sends suggested categories for review.

15. Automating Monthly Financial Reports

- *Problem*: Manual reporting is slow and prone to errors.
- *Solution*: Automate report generation.

🔧 **Tools**: QuickBooks/Xero + Zapier + Google Sheets

1. **Trigger:** End of the month.

2. **Auto-Pull Data:** Sync QuickBooks/Xero data to Google Sheets.

3. **Generate Report:** Use pre-built templates to generate a financial summary.

16. Automating KPI Dashboards

- *Problem*: Checking performance metrics is tedious.
- *Solution*: Create live dashboards.

🔧 **Tools**: Google Data Studio + Zapier

1. **Pull Data:** Sync data from QuickBooks and Financial Cents.

2. **Auto-Update:** Refresh dashboards daily.

3. **Weekly Snapshot:** Send reports to Slack/email.

Advanced Automations

17. Automating Client Satisfaction Surveys

- ◆ *Problem*: Firms often miss the opportunity to collect client feedback due to manual processes.
- ◆ *Solution*: Automate post-service feedback collection.

🔧 **Tools**: Google Forms/Typeform + Zapier + Slack/Email

🔄 **Steps to Automate:**

1. **Trigger:** When a client's project is marked complete in Financial Cents, Zapier sends a Google Form or Typeform survey via email.

2. **Reminder Sequence:** If no response within 7 days, Zapier triggers a follow-up email.

3. **Alert & Analysis:** Responses are sent to Slack or a Google Sheet for review.

- ◆ *Bonus*: Use ChatGPT to analyze feedback trends and generate insights.

18. Automating Tax Extension Requests

- ◆ *Problem*: Tracking and submitting tax extension requests manually is prone to errors.
- ◆ **Solution**: Automate tracking and reminders.

🔧 **Tools**: Financial Cents + Zapier + IRS e-File System

🔄 **Steps to Automate:**

1. **Tag Clients Needing Extensions:** In Financial Cents, mark clients who may need an extension.

2. **Automated Client Notification:** Zapier sends an email confirming they want an extension.

3. **Auto-Fill & Track Submission:** Use Zapier to pull client data into a pre-filled IRS extension form.

4. **Deadline Alerts:** Set reminders for the team to verify submission before the IRS deadline.

- ◆ *Bonus*: Use ChatGPT to auto-draft email templates for extension requests.

Advanced Automations

19. Automating Social Media Posts for Tax Season

- *Problem*: Posting tax tips and reminders manually takes too much time.
- **Solution**: Schedule automated social media content.

🔧 **Tools**: Buffer/Hootsuite + Zapier + ChatGPT

🔄 **Steps to Automate:**

1. **Content Generation:** Use ChatGPT to generate engaging *tax tips, deadlines, and reminders* for social media.

2. **Auto-Scheduling:** Upload posts to *Buffer* or *Hootsuite* for automatic posting throughout tax season.

3. **Engagement Monitoring:** Use Zapier to *send notifications* for comments/questions so you can respond promptly.

- *Bonus*: Set up *auto-replies* for FAQs using ChatGPT + Zapier + Twitter/X DM automation.

20. Automating End-of-Year Client Check-Ins

- *Problem*: Firms manually reach out to clients to discuss tax planning, financial health, and upcoming changes.
- **Solution**: Automate personalized end-of-year check-ins.

🔧 **Tools**: Financial Cents + Gmail/Outlook

🔄 **Steps to Automate:**

1. **Identify Clients for Check-Ins:** Use *Financial Cents* to tag clients needing a year-end review.

2. **Auto-Send Check-In Email:** Financial Cents sends a *personalized email* prompting clients to book a review call.

3. **Calendly Integration:** Clients self-schedule meetings via *Calendly* to avoid back-and-forth emails.

4. **Follow-Up Task:** If no response within 7 days, a reminder email is sent, and a task is created in Financial Cents.

- *Bonus*: Set up *auto-replies* for FAQs using ChatGPT + Zapier + Twitter/X DM automation.

Top Templates From Our Community Library

Top Templates From Our Community Library

1 ## Lead Call & Diagnostic Review - JR

This template can be used to kick off a new lead, schedule a discovery call, complete a diagnostic review, and then send a proposal. It is meant to pair with the cleanup template I also shared.

≡ 42 tasks ☑ 3 client tasks ⚡ Automations 📄 Resources

✏ **Author:** Jenny Rost
📄 **Work type:** Bookkeeping
📍 **Location:** United States
👤 **Client industry:** Generic
🗐 **Version**: 6 (Latest)

⬇ Download

2 ## Monthly Bookkeeping

This template includes our full monthly bookkeeping process, including our Monthly Quality Control (QC) Review in QBO.

≡ 13 tasks ☑ 1 client tasks ⚡ Automations 📄 Resources

✏ **Author:** Jenny Rost
📄 **Work type:** Bookkeeping
📍 **Location:** United States
👤 **Client industry:** Generic
🗐 **Version**: 3 (Latest)

⬇ Download

3 ## Compilation

This template streamlines the compilation process for Canadian clients, from collecting statements to reconciling accounts, creating reports, closing the books, and securely sharing final documents.

≡ 10 tasks ☑ 3 client tasks ⚡ Automations

✏ **Author:** Michael Case
📄 **Work type:** Bookkeeping
📍 **Location:** Canada
👤 **Client industry:** Generic
🗐 **Version**: 1 (Latest)

⬇ Download

4 ## Staff onboarding

This template simplifies and structures the onboarding process for Canadian staff, covering everything from orientation, role-specific training, and cultural integration to goal setting, ongoing support, and career development.

≡ 18 tasks

✏ **Author:** Debbie Foot
📄 **Work type:** Admin
📍 **Location:** Canada
👤 **Client industry:** Financial Services
🗐 **Version**: 1 (Latest)

⬇ Download

Top Templates From Our Community Library

5 Accounts Production

I use this template to streamline and standardize the year-end accounts process for the UK-based businesses across various industries. It walks your team through every key step —from automatically requesting financial documents from clients to preparing, reviewing, and finalizing financial statements.

≡ 8 tasks ☑ 3 client tasks ⚡ Automations

✎ **Author:** Nina Baikoro
🗋 **Work type:** Accounting
◯ **Location:** United Kingdom
👤 **Client industry:** Generic
🗐 **Version:** 1 (Latest)

⬇ **Download**

6 T1 Individual Tax Return – Canada

This template helps simplify and organize the entire tax return process for Canadian clients. It covers everything from collecting client info and authorizations to preparation, reviewing, and filing the return via EFILE, as well as follow ups.

≡ 9 tasks ⚡ Automations

✎ **Author:** Darlene Williams
🗋 **Work type:** Tax
◯ **Location:** Canada
👤 **Client industry:** Generic
🗐 **Version:** 1 (Latest)

⬇ **Download**

7 Boscia & Boscia PC 1040 Tax Return

This comprehensive tool offers step by-step guidance, checklists, and expert tips for accurate filing. Tailor it to various client scenarios to maximize efficiency and accuracy in tax preparation.

≡ 9 tasks ☑ 1 client task ⚡ Automations

✎ **Author:** Nick Boscia
🗋 **Work type:** Tax
◯ **Location:** United States
👤 **Client industry:** Generic
🗐 **Version:** 1 (Latest)

⬇ **Download**

8 1099 Preparation

This template organizes the entire 1099 preparation process, from identifying eligible vendors and confirming information to drafting, reviewing, filing with the IRS, and securely sharing final forms with clients.

≡ 7 tasks ☑ 6 client tasks

✎ **Author:** Jami Dorman
🗋 **Work type:** Tax
◯ **Location:** United States
👤 **Client industry:** Generic
🗐 **Version:** 1 (Latest)

⬇ **Download**

Conclusion

Conclusion

The results of the 2025 State of Workflow Automation Research Report clearly demonstrate that workflow automation is a powerful tool for driving efficiency, improving client and staff experiences, and fostering collaboration. Firms that invest in automation gain measurable time savings, faster onboarding, and more efficient document collection processes.

However, the report also highlights opportunities for improvement, including refining onboarding workflows and enhancing team collaboration tools. As firms continue to embrace automation, focusing on ease of use, cost-effectiveness, and integration capabilities will be key to maximizing their return on investment.

The sweet spot, as we also saw in the data, is having **documented systems and processes**, then using **workflow automation software** to implement and automate them efficiently.

This report provides valuable benchmarks and insights for firms seeking to implement or expand their workflow automation strategies, ensuring they remain competitive in an evolving industry landscape.

A big thank you to everyone who responded to our survey and contributed to this year's **State of Accounting Workflow Automation Report**.

View last year's report below to compare the results:

***2024 State of Accounting Workflow Automation Report* ›**
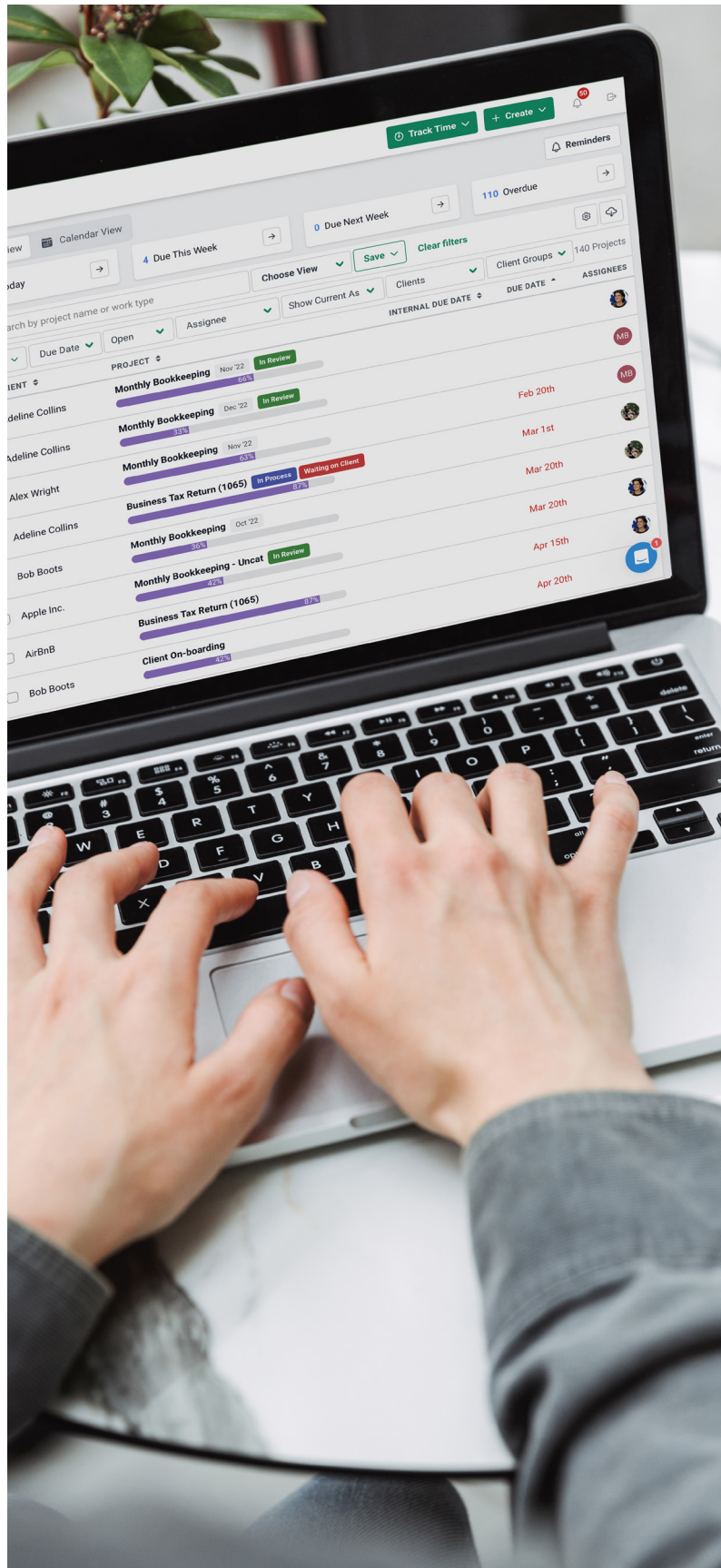
Study Methodology

This research report is based on responses from a survey conducted among accounting professionals using or considering workflow automation. The survey included both quantitative and open-ended questions to capture detailed insights. Key areas explored included current automation practices, decision-making factors, impact assessments, and future adoption plans. Responses were analyzed to identify trends, patterns, and key challenges faced by firms in their automation journeys. The findings presented in this report are aggregated and anonymized to ensure participant confidentiality.

FinancialCents