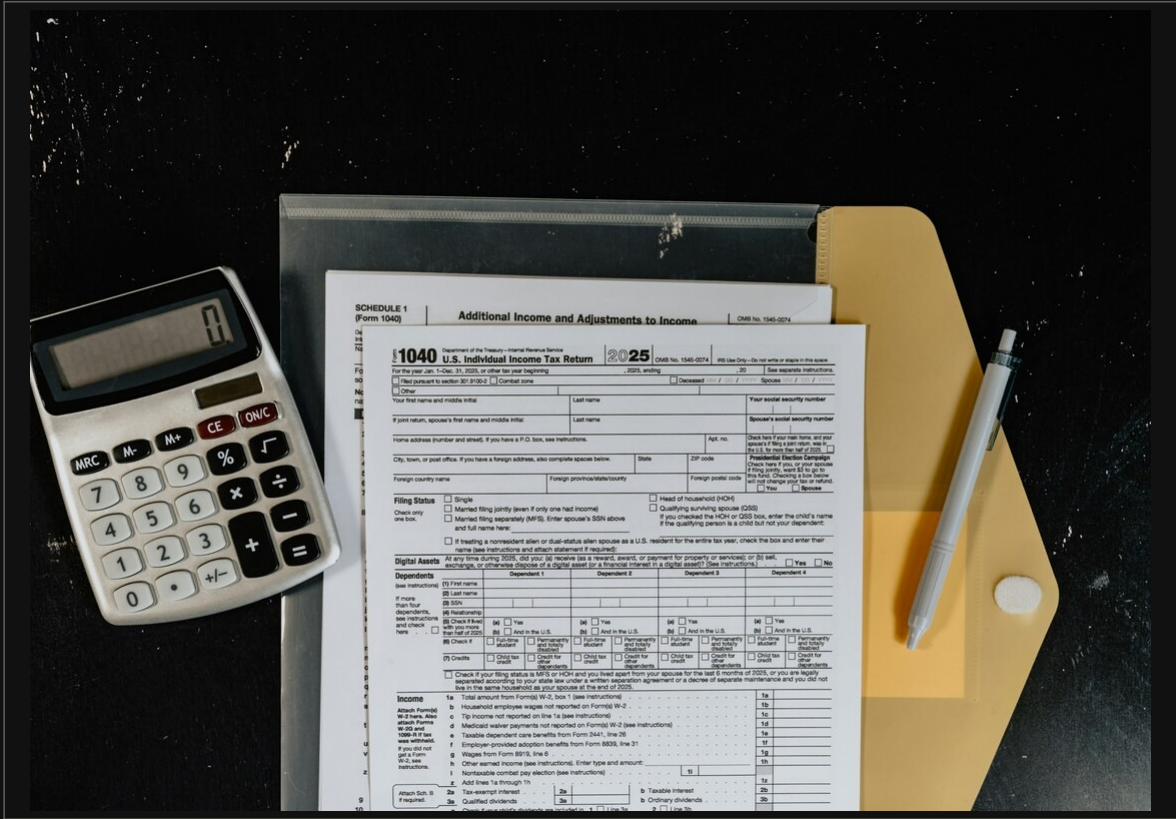


AI ROI GUIDE

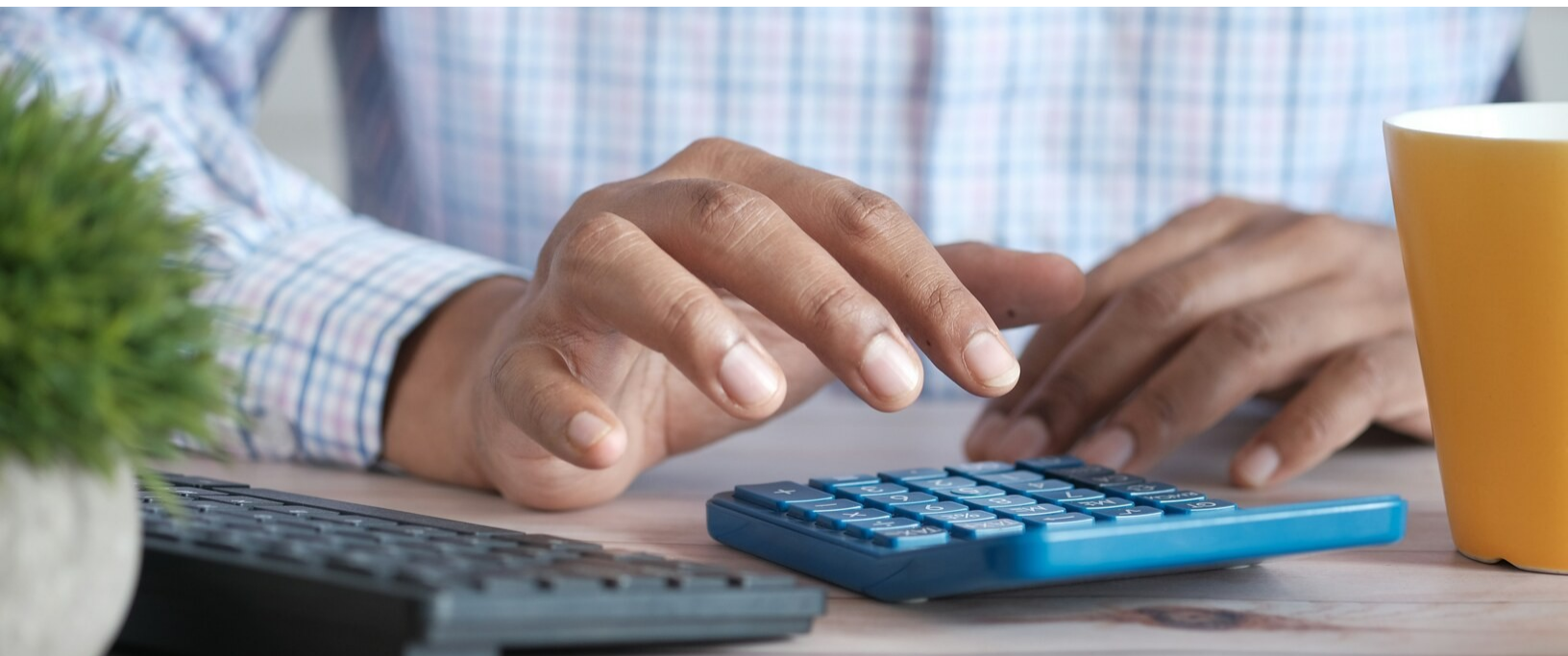
The AI Impact ROI Guide for Accounting & Tax Firms

TrackImpact



What ROI Means for Accounting & Tax Firms

Time saved is the leading indicator — but for accounting and tax firms, the compounding value shows up in higher client capacity during busy season, stronger margins on fixed-fee compliance work, and the ability to shift staff time from data entry toward the advisory work clients actually want to pay for.



Revenue & Capacity

AI-assisted workflows are already helping firms process more returns and more transactions without adding headcount — freeing up capacity to take on new clients or expand advisory services during the exact months when staff time is scarcest.

Profitability & Margin

Firms using AI for document intake, reconciliation, and first-draft return preparation report dramatic reductions in per-unit processing time — directly improving margin on fixed-fee and compliance-heavy engagements.

Talent

By automating repetitive data entry and reconciliation work, AI lets accountants spend more time on client communication, analysis, and advisory work — the parts of the job associated with higher job satisfaction and lower attrition in a profession already short on new entrants.

Why ROI for AI Adoption Matters Now



Accounting and tax firms are navigating a familiar squeeze: fee pressure from clients who increasingly expect real-time insight rather than a once-a-year return, a shrinking pipeline of new accountants, and a busy season that keeps getting more concentrated even as workloads grow.

AI adoption in the profession has moved past the experimentation phase. As of 2026, 41% of accounting firms have adopted AI in at least one operational workflow — up from under 20% in 2023.

Source: StealthAgents, "AI in Accounting and Finance Statistics 2026"

Accountants themselves expect AI to save roughly 240 hours a year — about 5 hours a week — according to Thomson Reuters Institute's Future of Professionals Report.

Source: Thomson Reuters Institute, Future of Professionals Report, 2025

A joint Stanford/MIT study published in the Journal of Accountancy examined 277 accountants across 79 firms and found that AI adoption cut the average monthly financial close by 7.5 days, shifted 8.5% of accountants' time from routine data entry to client communication and quality assurance, and was associated with a 55% increase in weekly client support relative to non-adopters.

Source: Journal of Accountancy, Stanford/MIT study, August 2025

Proven ROI Levers for Accounting & Tax Firms

Core levers accounting and tax firms are using today to connect AI adoption to measurable business outcomes — ordered by priority and grounded in publicly reported, sourced examples from across the industry.

Business Outcome	Example Lever	Real-World Example
Revenue Won / Retained	Faster return turnaround during busy season	CLH CPAs & Consultants cut simple-1040 assembly from 3-4 staff hours to a 30-45 minute review using Thomson Reuters' Ready to Review — freeing capacity for more clients per season.
Utilization Improvement	Reduction in manual data entry	Countsy (Vic.ai) cut invoice processing time 84% — from 5 minutes to under 2 minutes per invoice — with 78% of invoices now processed with no human input.
Quality & Speed of Client Service	Faster monthly close	Across 79 firms studied by Stanford/MIT, AI adopters cut their average monthly financial close by 7.5 days.
Margin Improvement	Cost per invoice / return processed	Countsy scaled invoice volume as its client base grew without adding proportional headcount, protecting margins.
Talent Recruitment & Retention	Staff time shifted to advisory work	AI-adopting accountants in the Stanford/MIT study shifted 8.5% of their working time from data entry to client communication and QA.
Partner / Senior Leverage	Senior review time vs. junior assembly time	Ready to Review shifts staff work from 3-4 hours of return assembly to a 30-45 minute review of an AI-drafted return.

Turning Inspiration to Adoption

Real ROI comes from moving beyond broad enthusiasm to focused execution. Firms seeing the strongest results narrow in on a set of high-impact workflows where AI materially changes how work gets delivered — not just makes individual tasks faster.

A client engagement is a clear example. From onboarding through advisory, AI can reduce friction across the full lifecycle of the relationship — accelerating document intake, reconciliation, and first-draft preparation, and freeing staff for the analysis and advisory work that actually differentiates a firm.



Managing a Client Engagement From Onboarding to Advisory

#	Stage	How Firms Use AI	Process
1	Client Onboarding & Data Collection	Automated document intake	AI tools synthesize source documents, prior-year returns, and client-provided files into structured data, replacing manual re-keying at the start of an engagement.
2	Bookkeeping & Reconciliation	Auto-coding & anomaly detection	AI platforms auto-categorize transactions and flag anomalies for human review instead of requiring line-by-line manual coding — Countsy's AP workflow is a direct example.
3	Return / Statement Preparation	First-draft generation	AI assembles a first-pass return or financial statement directly from gathered data — Ready to Review turns 3-4 hours of manual assembly into an AI-drafted starting point.
4	Review & Quality Assurance	AI-assisted review, not AI-assisted assembly	Staff shift from building the return to reviewing an AI-drafted one — a 30-45 minute review instead of hours of data entry — with AI flagging discrepancies against prior-year figures.
5	Advisory & Client	Reclaimed time	Time saved earlier in the engagement is redirected

	Communication	redirected to advisory	to cash-flow forecasting, tax strategy conversations, and proactive client communication — the work clients value most and firms bill best for.
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Real-World Examples

Two publicly reported, independently sourced examples of AI adoption in accounting — included to show what realistic ROI looks like today, cited from the vendors' own published case studies.

Scaling Accounts Payable Without Adding Headcount



Countsy is an Accounting-as-a-Service (AaaS) firm providing outsourced accounting and CFO services to venture-backed startups, processing accounts payable across hundreds of high-growth clients. Before automating, the firm processed roughly 3,500 invoices a month, each taking about 5 minutes to code manually — around 300 hours of staff time every month.

Countsy adopted Vic.ai's AI-powered platform to automate invoice ingestion, coding, and approval workflows across its standardized NetSuite/Bill.com stack.

Key Outcomes

- 78% of invoices are now processed entirely autonomously, with no human input required
- 84% decrease in processing time per invoice — from 4–5 minutes down to under 2 minutes
- 95% accuracy on AI-predicted GL coding (cost account, department, location)
- Invoice volume has scaled with client growth without a proportional increase in headcount, protecting margins

"We've seen an 84% decrease in processing time per invoice. It used to take our team 4–5 minutes per invoice, and now our average time per invoice is under 2 minutes," said Colman Edwards, Director of Technology at Countsy.

Source: Vic.ai, "Scaling with AI: 78% of Countsy invoices now autonomous," case study, Jan 2025

Cutting Busy-Season Return Prep Time



CLH CPAs & Consultants, an Indiana-based CPA firm, piloted Thomson Reuters' Ready to Review — an agentic AI tool built on CoCounsel that automates gathering client source documents and assembling 1040 tax returns.

Key Outcomes

- Approximately 1 hour saved per simple 1040 return
- Workflow shifted from 3–4 hours of staff time assembling a return from source documents to a 30–45 minute review of an AI-drafted return
- The firm described the efficiency gain as significant enough to be "a game changer" for busy-season capacity

Source: Thomson Reuters, "Transforming Busy Season: Introducing Ready to Review," Thomson Reuters Institute, 2026

Time Saved → Business Value

A 6-person accounting team saves 20 hours/month per person using AI-assisted workflows — in line with the ~5 hours/week accountants themselves expect from AI, per Thomson Reuters Institute.

Assuming a conservative 50% of that reclaimed time converts to billable client work, here's what that's worth against the cost of TrackImpact's own tracking layer.

Reallocated Hours

hrs/mo	20 hours saved per person, per month	× 6 people
	× 50% reallocated to billable work	
=	Total reallocated billable hours per month	60 hours

Billable Value

value	60 billable hours	× \$175 blended rate
=	Billable value created per month	\$10,500

Cost to Track & Prove It

cost	6 seats	× \$19/seat/month (TrackImpact Team)
=	TrackImpact cost per month	\$114

That's roughly a 92x return — not on the AI tools doing the work, but on the cost of proving what they're worth.

\$175/hr reflects the median blended CPA billing rate reported for 2025–2026 (\$150–\$250 for staff-level work). This calculator separates two different costs: the AI tools generating the time savings (Vic.ai, Thomson Reuters, and similar platforms) and TrackImpact's own cost to track and prove that value.

ROI Is a Change Management Process

AI doesn't create ROI on its own — proving it requires a structured approach to adoption, and a system for turning scattered usage into evidence leadership can act on.



Start With a Targeted Pilot

What Strong Pilots Include

- A high-volume, repetitive workflow (invoice coding, 1040 assembly, reconciliation)
- A clear KPI to track against (minutes per invoice, hours per return, days to close)
- A defined pre-/post- benchmark before rollout begins
- A small group of engaged staff across levels — not just the most tech-forward associate

From Proven ROI to Firm-Wide Impact



AI is already helping accounting and tax firms deliver real ROI — not just in hours saved, but in client capacity during busy season, margin protection on fixed-fee work, and a more sustainable path for staff who'd rather advise clients than re-key data.

Outcomes will vary by practice mix and how deeply a firm integrates AI into its workflows. But the firms seeing the strongest returns are the ones treating adoption deliberately — tracking who's using what, for which tasks, and what it's worth — instead of guessing at the end of the year.

Start Scoping ROI for Your Firm

This section is the input TrackImpact uses to help you scope, track, and prove AI's impact on your firm — here's how the pieces fit together, and what to work out with your team before you roll anything out.

How TrackImpact Helps

Recipe Builder

Not sure where to start? Recipe Builder builds you a personalized AI action plan on the spot — tell it your job title and the specific task you're stuck on, and it generates a copy-paste-ready prompt grounded in the AI tools you actually have (or an honest starting point if you don't have any yet), plus a quick read on how automatable the task really is. No course, no tool directory to dig through — just tell it what you're trying to do, so staff don't have to figure out AI adoption from scratch.

Try it: trackimpact.io/recipe

TrackImpact — ROI & Impact Tracking

Once staff start using AI, TrackImpact is where they log it: the tools, the workflows, the time saved. It turns that into evidence — reports that show exactly how AI is being used and what it's worth, ready for performance reviews or leadership updates.

Get started: trackimpact.io

Teams

Teams brings every individual's tracked impact together at the organizational level, so you can see adoption and value by department, office, or practice area, and compare who's driving results.

See how it works: trackimpact.io

Questions to Answer Before You Scale

These are the questions that shape how your firm rolls out and tracks AI adoption — work through them with your team before committing to a rollout.

What are your top business priorities, and how might AI support them?

e.g. Protecting margin on fixed-fee compliance work, winning more advisory engagements

Which workflows do you want to focus on first? Why?

e.g. Invoice coding, 1040 assembly, month-end close

What would the impact of improvement look like?

e.g. More clients served per busy season without added headcount

What pain points are slowing your team down today?

e.g. Manual data entry, reconciliation backlogs, staffing shortages

Who else needs to be involved in evaluating this?

e.g. Managing partner, practice leads, HR/talent

What questions or objections are you anticipating?

e.g. "How is this different from what we already track?" "What about client data privacy?"

Want Help Scoping This for Your Firm?

Talk it through with TrackImpact's founder directly.



Ade Molajo

Founder, TrackImpact

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- Team collaborating around a computer — Vitaly Gariev / Unsplash (img-workflow.jpg)
- White papers on a table — Lukas Blazek / Unsplash (img-case1.jpg)
- Person at a desk with laptop and papers — Unsplash (img-case2.jpg)
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