

WHITE PAPER

The Future of Accounting:

How AI-Powered Workflow Automation is Transforming CPA Firms

Oryele | AI-Powered Workflow Automation for Professional Services

EXECUTIVE SUMMARY

The accounting profession is experiencing unprecedented pressure. Firms face increasing regulatory complexity, growing client expectations, labor shortages, rising operational costs, and an ever-expanding volume of data.

While many firms have adopted cloud-based accounting platforms and digital tax preparation tools, significant inefficiencies remain across client onboarding, document collection, workflow management, communication, and compliance processes.

This paper explores how accounting firms can leverage AI-driven workflow automation to reduce operational costs, improve client satisfaction, and position themselves for sustainable growth.

THE CURRENT STATE OF THE ACCOUNTING INDUSTRY

The execution problem inside CPA firms.

Accounting firms today face several significant and interconnected challenges that threaten both profitability and long-term viability.

Staffing Shortages

The accounting profession continues to experience declining enrollment alongside increasing retirement rates among experienced professionals. The result is increased employee burnout, delayed client deliverables, higher labor costs, and reduced capacity to onboard new clients.

The Administrative Burden

Studies consistently show that accounting professionals spend a substantial portion of their time on non-billable administrative activities. These tasks reduce profitability while creating frustration among skilled staff who entered the profession to provide expert guidance, not to manage paperwork.

Required Security and Compliance Capabilities

- Chasing clients for missing documents and signatures
- Scheduling and rescheduling appointments
- Managing and routing email communications
- Updating workflow and project management systems
- Preparing and distributing engagement documentation
- Responding to routine client status inquiries

Increasing Client Expectations

Today's clients expect immediate responses, seamless online document exchange, real-time engagement status updates, and self-service capabilities. Many firms struggle to meet these expectations without proportionally increasing their staffing levels.

THE PROBLEM IN NUMBERS

What document chasing actually costs your firm.

The administrative cost of manual document collection is not abstract. It is measurable, and it compounds across every client engagement, every cycle, every year.

8-15 hrs

Per client per tax season

spent chasing documents alone

55%

Of CPA firms in 2024

cited workflow inefficiency as their top challenge

71 min

Saved daily by AI

by advanced AI users vs 49 min for beginners in accounting firms

Sources

→ 8-15 hours per client on document chasing: AICPA 2025 PCPS CPA Firm Top Issues Survey, via US Tech Automations (2026)

→ 55.5% of firms cite workflow inefficiency as top challenge: Financial Cents Accounting Trends Report (2026)

→ Advanced AI users save 71 minutes daily vs 49 minutes for beginners: Karbon 2025 Accounting Industry Report

→ AI adoption in U.S. accounting firms surged from 9% in 2024 to 41% in 2025; 70% of U.S. firms now use AI at least weekly: Wolters Kluwer Future Ready Accountant Report 2025

KEY USE CASES FOR ACCOUNTING FIRMS

Five workflows that eliminate the administrative burden.

01

AI Client Intake Agent

Client onboarding requires information gathering, engagement letter distribution, identity verification, and document requests. An AI Intake Agent collects information automatically, generates engagement packages, schedules appointments, and creates client records without staff intervention.

Key benefits: Faster onboarding • Reduced admin effort • Better first impression

02

AI Document Collection Agent

One of the largest pain points in accounting firms is obtaining required client documentation. AI can systematically request missing documents, send automated reminders at configurable intervals, track outstanding items across all active engagements, and escalate unresolved requests to staff. All without manual follow-up.

Key benefits: Reduced staff workload • Faster preparation cycles • Higher completion rates

03

AI Client Service Agent

Accounting firms receive thousands of repetitive inquiries annually. Questions about filing status, refund timing, required documents, and engagement progress. AI can provide immediate, accurate responses while integrating directly with firm workflow and tax systems, at any hour.

Key benefits: 24/7 availability • Reduced inbound call volume • Higher client satisfaction

<p>04</p>	<p>AI Knowledge Assistant</p>	<p>Accounting professionals spend considerable time locating tax rules, internal procedures, client history, and regulatory guidance. An AI Knowledge Assistant provides instant access to approved knowledge sources, delivering consistent answers in seconds rather than minutes.</p>	<p>Key benefits: Faster research • Improved consistency • Reduced onboarding time</p>
<p>05</p>	<p>AI Workflow Automation</p>	<p>Many firms rely on multiple disconnected systems including QuickBooks, Microsoft 365, tax software, CRM platforms, and document management tools. AI-powered workflow orchestration automates task creation, notifications, approvals, escalations, and status tracking across all platforms simultaneously.</p>	<p>Key benefits: Increased efficiency • Reduced errors • Full workflow visibility</p>

EXPECTED BUSINESS OUTCOMES

Execution that can be measured.

Firms implementing AI workflow automation consistently achieve meaningful, measurable improvements across operational, financial, and client-experience dimensions.

Productivity Gains	20-40% reduction in administrative workload, freeing professionals for billable and advisory work. Source: Wolters Kluwer Future Ready Accountant Report 2025; Karbon 2025 Accounting Industry Report.
Faster Client Response	Near real-time responses to routine inquiries, eliminating the lag clients find most frustrating.
Improved Retention	Reducing manual tasks, standardizing processes, and embedding AI into daily workflows reduces burnout and increases capacity for higher-value work. Source: Wolters Kluwer Future Ready Accountant Report 2025.
Increased Capacity	Firms can serve more clients without proportional increases in headcount or overhead.
Higher Profitability	Tech-advanced practices show up to 39% more revenue per employee. Source: Rightworks 2025, via Fiskl AI in Accounting Research (2026).

SECURITY AND COMPLIANCE

AI without governance is risk.

Accounting firms manage among the most sensitive financial and personal information entrusted to any professional service. Any AI platform deployed within a firm must meet stringent security requirements, enhancing protection and not introducing new risk vectors.

Required Security and Compliance Capabilities

- Encryption at rest and in transit for all client data
- Role-based access controls limiting information to authorized personnel
- Multi-factor authentication across all user access points
- Comprehensive audit logging for regulatory and compliance purposes
- Configurable data retention policies aligned with firm requirements
- Support for industry regulatory compliance frameworks

THE ORYELE PLATFORM

One platform. Every workflow. Zero inefficiency.

Oryele was founded to help professional service organizations modernize their operations through intelligent workflow automation. The platform combines purpose-built AI with deep integration into the tools accounting firms already rely on.

Platform Capabilities

- AI Agents and Intelligent Automation
- Workflow Orchestration Engine
- Microsoft 365 Deep Integration
- Client Communication Tools
- Knowledge Management System
- Business Process Orchestration

The Result

A unified operating environment designed specifically to improve efficiency, client service, and scalability for professional service firms.

CONCLUSION

The future of accounting will not be defined by firms that simply adopt AI. It will be defined by firms that successfully integrate AI into their operational workflows, transforming how they onboard clients, collect documents, answer inquiries, and manage work.

By automating repetitive administrative tasks and enabling professionals to focus on advisory services, accounting firms can improve profitability, enhance client experiences, and create sustainable competitive advantages that are difficult to replicate.

The question is no longer whether AI will impact accounting. The question is which firms will embrace the opportunity first.

Ready to Transform Your Firm?

Contact Oryele today to learn how AI-powered workflow automation can be tailored to your practice.

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