

UPDATED JUNE 2026

# THE AI-POWERED CPA PLAYBOOK

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Automate Intake.  
Reactivate Clients.  
Scale Without Hiring.

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Stop chasing docs — the system runs itself  
Recover clients hiding in your database  
For new practices and 10-year veterans

**Ai**  
— 360 —  
CPA

[ai360cpa.com](https://ai360cpa.com) | For New & Seasoned CPA Practices

# INTRODUCTION — This Book Is for Both of You

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There are two types of people reading this right now.

**The first** is just getting started. Maybe you passed the CPA exam, hung your shingle, and realized fast that no one in school taught you how to chase a document, set up an intake process, or stop a client from ghosting you three weeks before their deadline. You are figuring it out as you go, doing everything yourself, and wondering how the more experienced practitioners make it look manageable.

**The second** has been doing this for years. You have clients. You have a process — even if it is duct-taped together with email folders and a spreadsheet you built in 2019. You have seen tax seasons that nearly broke you. You know exactly what is wrong with your workflow. You just have not had the time, energy, or technical confidence to fix it.

This book is for both of you.

The problem is the same at every stage of a CPA career: too much time spent on tasks that do not require your expertise, not enough leverage on the relationships and work that actually move the needle.

A 2025 survey of accounting professionals found that **79.5% worked more than 51 hours weekly during tax season**. That same survey found that **74% rated their work-life balance as "Fair" or "Poor."** These are not outliers. These are the norm.

This is not a talent shortage. This is a system shortage.

The pages ahead describe a better system — built on real infrastructure, not hustle. Whether you are building your first practice or modernizing one that has been running for a decade, the framework is the same. What changes is where you start.

Let's get into it.

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# CHAPTER 1 — The \$50,000 Problem Every CPA Practice Has (And Most Don't Know It)

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Every practice has a number that never shows up on a report: the revenue that walked out the door before it ever came in.

Here is how it happens.

A new prospect finds you — a referral, a Google search, a Facebook post. They reach out on a Tuesday evening. You are in the middle of a return. You see the message Wednesday morning. By then, they have already booked with someone who responded within the hour.

You never knew they existed.

Now multiply that across a full year.

## The Math Behind the Invisible Loss

Your average client relationship is worth \$800 to \$1,200 per year. During tax season, a busy practice receives 3 to 5 new inquiries per week — roughly 60 to 80 per quarter.

If your response time exceeds four hours, you lose an estimated 20 to 30 percent of those inquiries to faster competitors. On 70 inquiries, that is 17 to 18 clients who never converted.

At \$1,000 per year per client: \$17,000 to \$18,000 in lost annual revenue. Every year.

But that is just the top of the funnel.

Industry research from debits.com found that **accounting firms lose an average of 15% of potential tax revenue due to inefficient intake processes alone**. SmartVault analysis found that **54% of clients fail to respond to initial documentation requests by the first deadline** — meaning nearly half of all active clients require at least one follow-up before work can begin.

One managing partner quoted in an industry study described the math at his firm this way: "Between mid-January and mid-April, our team spends 340 hours — that's eight full workweeks — just chasing clients for basic information."

340 hours. On chasing. Not on accounting.

Add the clients who go quiet mid-engagement because intake was too complicated. Add the clients who did not get a follow-up after filing and quietly moved to someone else next year. Add the referrals that never materialized because the experience was not remarkable enough to mention.

**The real number is not \$17,000. For most practices, it is \$30,000 to \$50,000 in combined lost revenue, preventable churn, and uncaptured referrals — annually.**

## The Fix Is Not More Staff

The instinct is to hire: a receptionist to answer faster, an admin to chase documents, an associate to handle overflow.

The problem is that this solution trades one bottleneck for another.

The 2024 Busy Season Barometer found that **37% of firms reported staffing shortages** — and that many who appeared to solve the problem did so by culling clients, not by building infrastructure. Staff get sick. Staff quit. Staff cost \$35,000 to \$55,000 per year before benefits. And they do not scale.

A system costs a fraction of that. It works 24 hours a day. It responds in seconds. It never forgets a follow-up. And it handles 10 clients or 500 clients with the same reliability.

**The fix is not more people. It is a better system.**

The rest of this book describes exactly what that system looks like — and how it applies whether you have 20 clients or 200.

**Action Point:** Write down your best estimate of how many new inquiries you received last tax season and how many became paying clients. That gap is the number this book is designed to close.

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## CHAPTER 2 — The Beginner's Reality: What Nobody Tells You in Year One

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*If you have been in practice for 10+ years, this chapter will feel familiar. It is also useful context for understanding the clients you serve who are building businesses of their own. Skip ahead to Chapter 3 if you want to go straight to the system.*

The CPA exam tests your knowledge of tax law, accounting standards, and financial reporting. It does not test whether you can chase a client who has not sent their W-2 by February 15th. It does not prepare you for the moment you realize you have 30 returns due in 10 days and three clients who have not responded to your emails.

One practitioner put it plainly in an industry survey: "College itself doesn't prepare you for a job in public accounting. It just gives you some tools to help you float. Fresh out of college, you are thrown in the deep end and expected to sink or swim."

### **The Three Traps That Catch New CPAs**

#### **Trap 1: No intake system means no control.**

Without a defined intake process, every new client is a free-form experience. You accept whoever reaches out, in whatever format they prefer, with whatever documents they decide to send. You spend the first two weeks of every new engagement figuring out what you actually need.

The fix is not complicated — but it requires building it before busy season, not during.

#### **Trap 2: Every hour is a billable hour you cannot get back.**

New practitioners often undercharge and over-deliver because they are still building confidence and reputation. The result is a practice that is technically full but financially undersized.

Automation changes the math. When a \$17 template pack replaces two hours of custom email drafting, you get those hours back.

#### **Trap 3: There is no off-season.**

Year one feels like a sprint that never ends. Tax season is the peak, but the follow-up, the billing, the client management — that never stops. Without systems, the administrative work fills every gap between returns.

### **What Beginners Actually Need**

Not more credentials. Not more clients. A repeatable system that handles the administrative layer so you can focus on the work you were trained to do.

The good news: it is easier to build the right infrastructure before you have 200 clients than after. The practices that scale cleanly are the ones that built systems when they were small.

This book gives you that system.

**Action Point:** List every manual task in your current workflow that does not require your CPA license to

complete. That list is your automation roadmap.

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## CHAPTER 3 — The Seasoned CPA's Dilemma: You Know What's Wrong. Now Fix It.

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*If you are in year one, read this chapter anyway. It shows you where the road leads without systems.*

You have been doing this long enough to know exactly what is broken. You could write this chapter yourself.

The intake process. The document chasing. The client who submits their W-2 in April after you filed an extension in March. The software that costs more every year and integrates with nothing. The associate who left in January — your third in two years — taking institutional knowledge with them.

You know the problems. You have even tried to fix some of them. The client portal you set up three years ago that half your clients still do not use. The email template that cut 20 minutes off the initial intake — until you had to update it and never got around to finishing the new version.

The 2025 Busy Season Survey found something counterintuitive: **Seniors and Managers reported the lowest recognition scores of any career level.** Partners average 7.6 out of 10. Associates average 6.3. Seniors and Managers — the people who carry the most operational weight — average 5.9. The mid-career slump is real, and it is largely driven by being stuck in operational chaos that more experience alone cannot fix.

### The Seasoned CPA's Specific Pain

**Software fatigue.** The 2025 Tax Software Survey found that **62% of practitioners cited price as their primary complaint** regardless of which software they used. Beyond price: forced mid-season updates, poor integrations, and intake tools that do not talk to practice management systems.

Industry analysis found that **97% of firms report inefficient technology use**, and that tax teams spend **40 to 70 percent of their time on data collection and processing tasks** that technology should handle. Should. But does not.

**The client cull trap.** A significant portion of established firms have solved their capacity problem by culling clients — firing the small, difficult, or unprofitable ones. In 2024, **close to 60% of firms with \$2M to \$5M in fees** culled their client list. This solves the short-term workload problem while creating a medium-term revenue problem. Fewer clients means less buffer against churn.

**The "Groundhog Day" cycle.** The same managing partner quoted in Chapter 1 put it this way: "The worst part? We know exactly what we need. And still, every single year, it's the same chaos. Like Groundhog Day, but with penalties and extensions."

Year after year, same problems. Different clients. Same outcome.

### What the Fix Actually Requires

Not more discipline. Not a different attitude toward clients. An infrastructure upgrade.

The practices that break out of this cycle share one characteristic: they stopped managing client relationships with email and started managing them with a system. When every client interaction is tracked, every missing document triggers an automatic reminder, and every filing triggers an automatic renewal sequence — the Groundhog Day stops.

This is not a technology problem. It is a decision problem. The technology exists. The question is whether you build it yourself or bring in someone who has already built it.

Chapter 7 has the honest math on both options.

**Action Point:** Name the single task in your practice that you have done manually, the same way, for more than three tax seasons. That task is your first automation candidate.

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# CHAPTER 4 — The Revenue You Are Ignoring: Your Existing Client Database

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This chapter is about money hiding in plain sight.

Every CPA practice accumulates clients over time. Some are active. Some filed once and never came back. Some moved, switched firms, or just disappeared after a hard tax year. Some were culled intentionally. Many were simply forgotten.

That list of dormant clients is not a graveyard. It is a reactivation opportunity.

## The Research on Inactive Clients

Industry data from the International Association of Accountants found that **re-engaging a past client costs five times less than acquiring a new one**. The relationship exists. The trust was established. The friction of a first engagement — explaining your process, building confidence, doing the intake from scratch — is already done.

What most practices lack is a system for reaching those clients at the right moment.

## Why Clients Go Inactive

Clients do not usually leave angry. They leave quietly. Research from FreshBooks and CPA Trendlines identifies the most common reasons:

- They did not hear from you between filings, so when tax season arrived, they called whoever they found first
- Their situation changed (new business, new state, new filing complexity) and they assumed they needed a specialist
- They had one frustrating experience — a missed email, a late return, a confusing bill — and silently decided to try someone new
- They moved and assumed distance was a problem (it rarely is for tax prep)
- They simply forgot which firm they used the prior year

None of these reasons are permanent. Most are addressable with a single well-timed touchpoint.

## The "1040 Orphan" Opportunity

One practitioner described a significant portion of their client base as "1040 orphans" — clients fired by larger firms for being too small or unprofitable. These clients exist in a cycle: they get released by a big firm, find a mid-size firm, get released again, and cycle through the market every few years.

With **close to 60% of larger firms culling their client lists in 2024**, there is a significant and growing pool of newly unserved clients looking for a practice that will actually service them.

A database reactivation system catches both: your own dormant clients and the newly displaced clients from larger firms who are actively looking.

## What a Reactivation System Looks Like

A working client reactivation system has four components:

### 1. The Audit

Pull every contact you have — current, past, and prospective — into a single CRM. Tag by status: active, lapsed (1 year), dormant (2+ years), prospect (never converted). Most practices doing this for the first time find 30 to 50 percent more contacts than they thought they had.

### 2. The Trigger

Set a time-based trigger: any client tagged "lapsed" who has not had activity in 11 months receives the reactivation sequence automatically. You do not track this manually. The system does.

### 3. The Sequence

A three-email reactivation sequence built around one idea: we remember you, we have room for you this season, and getting started is easier than you think.

- Email 1: Personal check-in. Not a promotion. Acknowledge the gap. Remind them what you did together.
- Email 2: Value-forward. Share one useful tax tip relevant to their situation. No ask.
- Email 3: Clear invitation. "We have [X] spots available for returning clients this season. Here's how to get started."

### 4. The Re-Intake

Returning clients do not want to start from scratch. Your intake system should recognize a returning client, pre-fill what you already know, and only ask for what has changed. This single detail — not making a returning client feel like a stranger — dramatically increases reactivation rates.

### The Math on Reactivation

Assume your practice has 80 dormant clients from the past three years. If you reach 60 of them with a proper reactivation sequence and 20% re-engage, that is 12 returning clients.

At \$900 average annual value: \$10,800 in recovered revenue from a three-email sequence and a CRM audit.

No ads. No referral program. No new client acquisition. Just a system working on clients you already earned.

**Action Point:** Export every contact from your email client or tax software. Count how many are active vs. lapsed vs. never-converted. That count is your reactivation asset.

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# CHAPTER 5 — Client Intake: The Leaky Bucket You Haven't Fixed

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If there is one thing that separates a growing practice from a stagnant one, it is intake.

Intake is the first impression, the first interaction, and the first test of your systems. New clients judge your entire practice by how well you handle the first 15 minutes of contact. A slow, confusing, or fragmented intake experience signals: *this is what working with them will feel like.*

## How Most Practices Handle Intake Today

SmartVault's analysis of CPA practice intake found a consistent pattern across small and mid-size firms:

"You copy/paste request lists from last year. There's no visibility into who's submitted what. You still use mail to send out your organizers — they don't get completed, plus it costs you in postage and time."

The standard manual intake flow:

1. Client emails or calls
2. Staff replies asking them to fill out a PDF and email it back
3. Client scans or photographs the PDF (often poorly)
4. Staff manually enters the data into a spreadsheet or tax software
5. Staff emails a second time requesting documents
6. Documents arrive over 3 to 5 days across multiple emails
7. Staff consolidates everything into a folder, manually named

From first contact to a complete file: 5 to 10 business days. Average staff time: 2 to 3 hours per new client. And that is when it goes smoothly.

## The "Santa Claus Syndrome"

FreshBooks identified a pattern they call the Santa Claus Syndrome: clients who only engage with their accountant once per year treat the relationship as a seasonal event. By the time next tax season rolls around, they have forgotten what they submitted last time, forgotten which documents you need, and forgotten the instructions you sent in March.

The result is the same intake friction, every year, with the same client. Not because they are difficult — because there is no system holding the relationship together between filings.

## What an Automated Intake System Looks Like

A smart intake system does the following within seconds of a new submission:

- Sends a confirmation email with a personalized greeting and what to expect
- Delivers a secure intake form with conditional logic (only shows fields relevant to their tax situation)
- Requests document upload directly through the form — no email attachments
- Creates a client record in the CRM automatically

- Notifies the assigned team member with a task to review
- Sends the client a document checklist tailored to their specific situation

From first contact to a complete file: 24 to 48 hours. Staff time per new client: under 20 minutes.

### **The 12 Fields Every CPA Intake Form Needs**

1. Full legal name
2. Date of birth
3. SSN or EIN — collected securely, not via email
4. Filing status
5. Address
6. Email and preferred phone number
7. Prior year return status (filed with you, filed elsewhere, not filed)
8. Employment status (W-2, self-employed, both)
9. Major life changes in the past year (marriage, divorce, new dependent, home purchase, new business)
10. Estimated number of 1099 or K-1 forms
11. Preferred contact method and availability window
12. Referral source

With these 12 fields captured on submission, you walk into every new client relationship with full context. No discovery call. No email chain before work begins. No "what did you say your filing status was again."

### **The Competitor Advantage**

Every week, a prospect in your market contacts three practices at once. The one who responds first with a professional, frictionless experience — a clean form, an immediate confirmation, clear next steps — is the one they remember.

The other two get a polite "I went with someone else."

This is not about quality of service. You may be the best CPA in the room. None of that matters if your intake signals disorganization before you ever meet.

**Action Point:** Send yourself through your own intake process as a new client. Time how long it takes from first contact to a complete file. The goal is under 48 hours with under 20 minutes of staff time.

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# CHAPTER 6 — Follow-Up Sequences That Close Without Chasing

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The most predictable revenue leak in a CPA practice is the lead who expressed interest and went silent.

They are not gone. They are waiting to see if you follow up.

Most practices do not follow up consistently because follow-up requires someone to remember — and memory is not a system.

Research from moneythumb.com found that practitioners who fail to establish clear follow-up systems end up chasing clients "for many years to come." One practitioner noted: "If tardy behavior becomes habitual, accountants can expect to chase clients for many years to come." Not one season. Many years. The same clients. The same chaos.

## The 5-Touch Follow-Up Sequence

A follow-up sequence is a pre-written series of emails that sends automatically based on where a lead or client stands in your pipeline. Zero staff attention after it is built.

### Touch 1 — Day 0 (Immediate): The Intake Confirmation

Subject: Your tax information is in — here's what happens next

Purpose: Confirm receipt, set expectations, reduce anxiety. Most clients immediately wonder if their information went somewhere secure. Answer that question before they ask it.

Content: Confirm receipt. Explain the next step. Provide a direct contact for questions.

### Touch 2 — Day 3: The Document Reminder

Subject: One thing standing between you and a filed return

Purpose: Prompt document upload without being aggressive. Most intake delays happen because clients do not know what to send.

Content: Personalized list of documents still needed. Clear upload link. One-sentence explanation of why each matters.

### Touch 3 — Day 7: The Status Update

Subject: Quick update on your return

Purpose: Keep the client informed and demonstrate progress. Silence after intake is the number one reason clients call to check in — and when they call, it costs you time.

Content: Where their return stands. Any upcoming deadlines. A clear note on when they will hear back.

### Touch 4 — Day 14: The Urgency Nudge

Subject: [Name], we are ready to start — just need one thing

Purpose: Re-engage clients who have gone quiet. Tone is warm, not passive-aggressive.

Content: Name the specific item outstanding. Explain the consequence of delay (extension, potential penalties). Restate the upload link.

### **Touch 5 — Day 21: The Clear Decision Point**

Subject: Last chance before we recommend an extension

Purpose: Create a deadline. Some clients need one to act.

Content: Clear statement that without the missing item by a specific date, you will need to file an extension. Explain what that means. Offer a 5-minute call if they have questions.

### **Why Automation Beats Memory**

A staff member managing 150 active clients cannot reliably remember who is on Day 3 and who is on Day 14. The sequence runs in the background based on when the lead entered the system. Every client gets the right message at the right time.

This is not mass email. This is trigger-based, personalized communication at scale.

**Action Point:** Write the subject lines for each of the 5 touches adapted to your practice. You do not need to build the automation today. Write the subjects first. The content follows naturally.

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# CHAPTER 7 — Tax Prep Workflow: Before AI vs. After AI

The biggest efficiency gap in most CPA practices is not expertise. It is the workflow surrounding the work.

A CPA spending 45 minutes per return on administrative coordination can reduce that to 10 to 15 minutes with the right workflow — without cutting corners on actual tax preparation.

## Side-by-Side Comparison

Step	Manual Workflow	Automated Workflow
Client onboarding	Email PDF, wait for scan	Smart form, instant CRM record
Document collection	3–7 emails back and forth	Upload link, auto-reminder at Day 2 and Day 5
Document organization	Manual folder creation and naming	Auto-filed by client name and document type
Missing item follow-up	Staff remembers (or doesn't)	Automated trigger, no staff action required
Work assignment	Verbal or email handoff	Auto-assigned by return type and workload
Status communication	Client calls to check in	Auto-update email at each workflow stage
Review and signature	Email PDF, wait for reply	Secure portal link, auto-reminder if unsigned
Post-filing follow-up	Forgotten or sporadic	Auto-confirmation, renewal sequence starts
Referral request	Never or sporadic	Auto-sent 30 days post-filing

## The Time Math

A practice with 200 returns per season.

Manual workflow administrative time per return: 40 to 50 minutes.

Automated workflow administrative time per return: 10 to 15 minutes.

Time saved per return: 30 minutes (conservative).

Across 200 returns: 100 hours saved per season.

At a billing rate of \$150 per hour, that is \$15,000 in recovered time that can be redirected to client work, business development, or simply not working weekends. *(Illustrative. Actual results depend on practice size and implementation.)*

## What AI Adds to the Workflow

AI in a CPA workflow is not replacing the accountant. It is handling the mechanical extraction work that used to eat the first 20 minutes of every return:

- Reading a W-2, 1099, or K-1 and extracting key fields automatically
- Flagging inconsistencies between what a client reported in intake and what their documents show
- Identifying missing documents based on what the intake form indicated should be present
- Pre-populating tax software fields to reduce manual data entry

The CPA still reviews, verifies, and signs off. The AI handles the extraction layer.

### **The Compounding Effect**

When your practice runs on an automated workflow, clients notice. They notice because you respond faster. They notice because they always know where their return stands. They notice because you never lose a document.

They tell other people.

The referral effect of a systemized practice is invisible on a P&L but substantial in practice. You cannot point to the return that took 10 days instead of 4 and call it a lost referral. But the practice that consistently delivers a clean, professional experience creates clients who talk.

**Action Point:** Pick the three steps in your current workflow that consume the most time. Those are your highest-leverage automation targets.

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# CHAPTER 8 — The Real Cost of Building This Yourself

Everything described in this book is buildable. The technology exists. The integrations exist. The templates exist.

The question is not whether you *can* build it. It is what building it will actually cost — in time, in mistakes, and in what you give up while you are building.

## The Tool Stack You Would Need

Component	Purpose	Examples
CRM	Track every client and lead through the pipeline	GHL, HubSpot, Salesforce
Form Builder	Smart intake with conditional logic and document upload	Typeform, Jotform, GHL Forms
Email Automation	Sequences, triggers, personalization	Mailchimp, ActiveCampaign, GHL
Document Storage	Organized, searchable, secure	Google Drive, Dropbox, ShareFile
Calendar Integration	Booking without phone calls	Calendly, Acuity, GHL Calendar
Client Portal	Status visibility, document access	Client Hub, TaxDome, GHL

Six tools. Each with its own setup, billing, support queue, and learning curve.

The 2025 Tax Software Survey found that **62% of practitioners cited price as their top software complaint** regardless of vendor. And research from stealthtech365.com found that firms "cobbling together different tools" end up "creating an obstacle course where each additional system adds another layer of complexity."

This is the DIY reality: you solve one problem and create three integration problems.

## The Build Timeline (Realistic)

Phase	Estimated Time
Research and tool selection	8–15 hours
Account setup and configuration	6–10 hours
Integration between tools	15–25 hours
Form and sequence design	10–20 hours
Testing and debugging	10–20 hours
Staff training	5–10 hours

Phase	Estimated Time
Total	54–100 hours

Conservative estimate for someone technically comfortable. Double it if you have never built an automation workflow before.

And that is the build. Maintaining it — updating sequences, fixing broken integrations after vendor updates, onboarding new staff — is an ongoing cost that never stops.

### The Hidden Costs

- Wrong tool selection costs you migration time six months later
- Independent integrations break when one vendor updates their API
- When you leave for two weeks, no one knows how the system works
- If something breaks during peak season, you fix it yourself while managing client volume

### The Honest Calculation

If your time is worth \$150 per hour and you spend 80 hours building this system: \$12,000 in time invested. Plus \$3,000 per year ongoing to maintain it.

A done-for-you system built by people who have already solved these problems — at a fraction of that cost — is not a luxury. It is arithmetic.

**The question is not whether you need this. The question is how fast you want it.**

## CHAPTER 9 — What Real CPA Practitioners Are Saying (And What It Means for Your Practice)

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The pain points in this book are not hypothetical. They come from conversations, surveys, and research across the accounting profession. This chapter puts the voices together.

### On Document Chasing

"Between mid-January and mid-April, our team spends 340 hours — that's eight full workweeks — just chasing clients for basic information." — Managing Partner, mid-size CPA firm

"If tardy behavior becomes habitual, accountants can expect to chase clients for many years to come." — moneythumb.com

"Clients don't know what to send or when to send it. Files arrive in every format. Your team wastes time organizing instead of preparing returns." — SmartVault

### On the Burnout Reality

The 2025 Busy Season Survey of accounting professionals found:

- 79.5% worked more than 51 hours weekly during peak season
- 74% rated their work-life balance as "Fair" or "Poor"
- Only 10% reported a genuinely positive busy season experience
- Senior-level practitioners reported the highest stress — 75% called it stressful, with recognition scores lower than associates

"Burnout in accounting has been normalized for too long. Professionals hide behind phrases like 'It's just busy season.'" — distinctrecruitment.com

### On the Staffing Trap

"Being perpetually short-staffed means taking on more duties and working extra unpaid hours." — practitioner quote, Going Concern

"Leadership is lacking, and we're often understaffed to save money. This leads to long hours and more tasks." — practitioner quote, Going Concern

300,000 accountants and auditors left the profession in the two years through 2024 — a 17% workforce reduction. The firms left behind absorbed the volume.

### On What Experienced Practitioners Actually Want

"I wasn't providing the value I really wanted to my clients — I was trapped in the hamster wheel of tax prep and bookkeeping." — Jackie Meyer, CPA (CPA Practice Advisor)

Research shows practices offering tax planning alongside compliance grow revenue at 30%+ annually. Those offering compliance only grow at 9%. The difference is not expertise — it is available time. The planning

conversations cannot happen when the accountant is chasing W-2s.

## On AI and the Future

"67% of practitioners are uncertain about AI's impact." — CPA Trendlines 2024 Barometer

The concern is real: will AI commoditize the compliance services that anchor most practices? The answer is not no. The answer is that it already is — and the practices that use AI as leverage rather than fearing it as a threat are the ones that are growing.

The AI is not replacing CPAs. It is replacing the 40 to 70 percent of time that CPAs currently spend on data collection and processing tasks that require no professional judgment.

When that time comes back, the accountant can do the work only they can do: advise, plan, build relationships, and grow.

### What This Means for Your Practice

Whether you are in year one or year twenty, the path is the same: build systems that handle the mechanical layer so you can focus on the judgment layer.

That is what the AI360 CPA System is designed to do.

**Action Point:** Pick one quote from this chapter that resonates most. Write it down. That is the pain your practice needs to solve first.

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# CHAPTER 10 — The AI360 CPA System: What's Inside and How to Get It

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Everything in this book — the intake system, the follow-up sequences, the document pipeline, the client portal, the reactivation campaigns, the tax season dashboard — exists as a fully built, fully connected system.

It is called the AI360 CPA System.

## Who It Is For

This system was built for two types of practices:

**The practice that is just starting out** and wants to build the right infrastructure from day one — so growth does not require adding headcount at every milestone.

**The practice that has been running for years** and is ready to stop doing manually what a system should be handling — so the owner can focus on clients, planning, and growth instead of coordination.

## What Is Included

### 1. Automated Intake Portal

A branded intake form that captures the 12 fields from Chapter 5, requests document upload, and creates a client record in your CRM automatically. No PDF. No manual data entry. Returning clients are recognized and pre-filled.

### 2. Document Collection Pipeline

A smart pipeline that tracks every client's document status in real time. Missing documents trigger automatic reminders at Day 2 and Day 5. Your team sees a dashboard — not an inbox full of emails.

### 3. 5-Touch Follow-Up Sequence

Pre-written, loaded into your system, triggered automatically by client status. Runs without staff involvement from first contact to filed return.

### 4. Client Database Reactivation System

The full three-email reactivation sequence from Chapter 4 — built into your CRM with automatic tagging and scheduling for lapsed clients. Runs once per year, automatically, before tax season begins.

### 5. Client CRM With Full History

Every email, form submission, document upload, and status change logged in one record. No searching inboxes. No missing files.

### 6. Calendar Booking Integration

Clients book appointments without phone calls. Confirmation, reminder, and rescheduling handled automatically.

### 7. Tax Season Dashboard

A single view of every active client: pipeline stage, outstanding items, and upcoming deadlines. Built for peak season when you cannot afford surprises.

## 8. Post-Filing Renewal Campaign

An automated sequence that begins 10 months after filing — re-engaging clients before they start looking at alternatives. Most practices lose clients not because of quality or price, but because someone else reached out first.

### How It Gets Built

This is not a software subscription. This is a done-for-you build inside your own GHL account. You own it. No ongoing fees to AI360.

The build takes 30 days. During that time, we set up and configure your account, build and customize all forms, sequences, and pipelines, connect your existing tools where possible, train you and your staff on the system, and test the full client journey from first inquiry to post-filing.

When we hand it off, it runs.

### The Next Step

If you want to see exactly what this looks like in your practice, the next step is a free 20-minute strategy call.

No pitch. No pressure. We walk through your current workflow, show you what the system looks like, and tell you honestly whether your practice is a good fit for the build.

If it makes sense, we discuss what the engagement looks like and what it costs. If it does not make sense, you leave with a clear picture of what to build yourself — and this book is your roadmap.

## Ready to See Your Practice on the Other Side?

Book a free 20-minute AI360 CPA Strategy Call. Walk through your current workflow. See the automated version. No pitch. No pressure.

### What Happens on the Call

- Live walkthrough of the AI360 CPA System
- Honest assessment of your practice's automation readiness
- Your top 3 highest-leverage automation targets identified
- Pricing and timeline for a done-for-you build — if it's the right fit

**5 new practices per month. Spots fill during tax season lead-up.**

**Book Your Free Strategy Call — [ai360cpa.com/strategy-call](https://ai360cpa.com/strategy-call)**

# CONCLUSION — The Moment Your Practice Starts Working For You

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The shift happens faster than most people expect.

The first time a new client submits your intake form at 11pm and receives an automatic confirmation — and you find out about it the next morning when you open your dashboard to a complete file — something changes.

Not in the work. You still review the return, apply your expertise, sign your name.

What changes is the experience of doing the work.

You are no longer the bottleneck. The system handled the intake. The system collected the documents. The system sent the reminders. The system notified you when everything was ready.

You showed up and did the part only you can do.

That is the practice this book was written to help you build.

For the practitioner just starting out: build it now. The infrastructure is easier to construct when you have 30 clients than when you have 300.

For the practitioner who has been doing this for years: stop tolerating what you know is broken. You have earned the right to a practice that works at your level — not one that keeps you chasing documents at 9pm.

The system exists. The only question left is when you decide to use it.

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## ABOUT AI360 CPA

AI360 CPA is a practice automation service that builds modern client management systems for CPA firms, tax preparers, and bookkeeping practices. Every system is custom-built, fully owned by the client, and designed to scale without adding headcount.

**[ai360cpa.com](https://ai360cpa.com)**

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# YOUR NEXT MOVE — Three Tools to Accelerate Your Practice

## TOOL 1: CPA Client Intake Template Pack

\$17

### Fix Your Intake Process This Week

The exact intake form fields, email scripts, document checklists, and 5-touch follow-up sequence from this book — formatted and ready to use. Includes the client reactivation email templates for your dormant database.

- 12-field intake form template (paste into any form builder)
- 5-touch follow-up sequence — subject lines and full body copy
- Document checklist by return type (W-2, self-employed, business)
- 3-email client reactivation sequence for lapsed contacts
- Post-filing confirmation and renewal email templates

**Add this to your order and start this week.**

## TOOL 2: AI360 CPA System Audit Call

\$97

### 30-Minute Practice Assessment — Know What to Build First

A private working session with an AI360 CPA specialist. We review your current workflow, identify your top 3 automation opportunities, and give you a prioritized build plan — whether you use our services or not.

- Live workflow review of what you have today
- Ranked list of your highest-leverage automation targets
- Tool recommendations matched to your practice size and budget
- Reactivation audit — how many dormant clients you have and what to do with them

This is a working session. You leave with a plan.

## TOOL 3: AI360 CPA Full System Build

## Done For You

### Your Entire Practice Automation System — Built in 30 Days

Everything in this book built, connected, tested, and handed off in your business. Intake portal. Document pipeline. Follow-up sequences. Client reactivation system. CRM. Tax season dashboard. Renewal campaigns. You own it forever. No monthly fees to AI360.

- Full system build in your GHL account
- Client database reactivation campaign configured and loaded
- Staff training and 30-day post-launch support
- Built for where you are today and where you are going

**5 new practices per month.** Book your free 20-minute call to see if it is the right fit.

[ai360cpa.com/strategy-call](https://ai360cpa.com/strategy-call)