

The CPA Firm Automation Checklist

A 20-point self-audit for accounting firm owners. Five minutes. Brutal honesty required.

Most CPA firms are leaking hours, leads, and revenue every week — and the owners don't know where the leaks are. Walk through these 20 statements and check every box that is true for your firm *today*. Tally your score at the end.

01 · BILINGUAL CLIENT CAPTURE

The differentiator no one else in your market has.

- Every incoming call is answered — live or by AI — 24 hours a day, including after hours and weekends.
- Spanish-speaking prospects can be fully served without a bilingual receptionist on staff.
- Your phone system answers in the caller's language automatically, in real time.
- Every new prospect receives an intake form by SMS within 60 seconds of first contact.
- Every lead lands in your CRM with full contact details — automatically, every time.

02 · DOCUMENT COLLECTION THAT DOESN'T STALL

Tax season runs without weekend overtime.

- Clients receive secure, mobile-friendly upload links by SMS in English or Spanish.
- Missing-document reminders go out automatically until everything is in.
- One central dashboard shows exactly what is outstanding for every active client.
- No client is ever asked twice for the same document.
- Document collection during tax season runs without weekend or evening overtime.

03 · WORKFLOW THAT RUNS ITSELF

You see every client. Nothing slips.

- Tax prep, bookkeeping, payroll, and advisory each have their own pipeline and stages.
- You can see exactly where every active client stands in under 30 seconds.
- Every prospect and dormant client is kept warm by automated follow-up — without staff effort.
- Handoffs between team members happen without dropped balls or repeat work.
- You have a defined re-engagement process for clients who go quiet.

04 · MONEY IN, REPUTATION UP

Get paid faster. Grow without ad spend.

- Invoices send automatically the moment work is complete; clients pay by ACH or card.
- Past-due balances trigger automated payment reminders without any staff intervention.
- Happy clients are automatically asked for a Google review after every engagement.
- Referral sources are tracked at intake so you know exactly which sources drive growth.
- You know precisely how much you are owed and by whom at any given moment.

YOUR SCORE · TALLY EVERY CHECKED BOX. OUT OF 20.

17–20 · Elite Efficiency

Your firm is operating at the top tier. Keep tuning what works.

12–16 · Visible Gaps

Closing 3–5 of these gaps would meaningfully change your tax season.

6–11 · Running on Duct Tape

Automation will pay for itself in saved admin hours within 60 days.

0–5 · Six Figures on the Table

This is the highest-leverage thing you can fix this quarter.

READY TO FIX THE GAPS?

Book a Free 30-Minute CPA Automation Audit

ai360network.com/cpa.html

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