INSIDE THE TECHNOLOGY CIRCLES

FALL 2026



From AI Experimentation to Strategic Execution: The Shifts Reshaping Technology Leadership

Technology leaders in accounting firms are navigating a new phase of innovation. AI capabilities are advancing, automation is becoming more accessible, and technology decisions increasingly affect how firms operate, serve clients and develop their people.

The focus is shifting from evaluating what's possible to determining what delivers measurable value, how to manage the risks and who is accountable for results.

SIGNALS FROM THE ROOM

SIGNAL 1 AI Is Moving From Individual Productivity to Firmwide Execution

AI is evolving beyond drafting and summarizing into agents capable of performing multistep workflows. Technology leaders are now focused on integrating these capabilities into existing systems, establishing human oversight and measuring whether automation delivers meaningful capacity and efficiency gains.

SIGNAL 2 Technology Strategy Is Becoming an Exercise in Governance and Value

As AI-enabled platforms expand across tax, audit and firm operations, technology leaders face increasingly complex decisions about integration, security and platform consolidation. The challenge is determining where existing investments can deliver more value, when specialized tools make sense and how to maintain control as systems become more autonomous.

SIGNAL 3 The Next Technology Advantage Depends on People and Adoption

Technology alone doesn't create better workflows or client experiences. Firms are examining how changing responsibilities, staff capabilities and client behaviors influence the success of new tools. Technology leaders are increasingly responsible for connecting innovation with training, process ownership and organizational alignment.

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3 THINGS TECHNOLOGY LEADERS ARE TESTING

- **AI Agents in Real Workflows**
  Firms are using, building and piloting AI applications for employee self-service, client intelligence, proposal generation and audit workflows, while exploring how to manage approvals and human review.
- **Automation and Platform Integration**
  Firms are expanding their use of automation and evaluating whether existing platforms can support more connected workflows. In the fall Technology Circle survey, 69% of respondents reported using Power Automate, compared with 23% in the spring survey.
- **Technology-Enabled Client Experiences**
  Firms are sharing practical approaches to client portals, document requests and digital engagement, including experiences with Suralink and SafeSend, to identify ways to improve adoption and create more consistent client interactions.

WHAT WE'RE HEARING

AI Adoption Is Outpacing Integration
The next challenge is embedding AI into everyday workflows with clear ownership, review processes and measurable results.

AI Tax Preparation Remains an Open Opportunity
Three in four fall survey respondents report having no AI tax preparation tool, signaling room for evaluation as firms consider emerging solutions.

Accountability Is Becoming a Technology Requirement
As automation takes on more work, leaders need to clarify who owns decisions, validates outputs and manages exceptions.

TAKE IT BACK TO YOUR FIRM

Where can AI create measurable value? Which workflows offer the greatest opportunity to recover capacity, improve quality or accelerate service, and how will we measure success?

Are our governance practices keeping pace with innovation? Who owns our AI-enabled workflows, what permissions do those systems have and where is human approval required?

Are we preparing our people and clients for change? How can we improve training, clarify responsibilities and strengthen adoption so technology investments translate into better experiences and outcomes?

CONNECT THE DOTS

The next phase of technology leadership is about turning innovation into sustainable firmwide value. That requires more than selecting the right tools. It takes clear priorities, strong governance, engaged people and a commitment to measuring results.

Inside the Boomer Technology Circles, leaders compare real-world approaches, challenge assumptions and work through these decisions with peers facing similar challenges.

What could your firm accomplish by connecting technology decisions more closely to business outcomes?

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