# INSIDE THE TAX LEADER CIRCLE

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## The Tax Practice of the Future Requires More Than Efficiency

Tax leaders are rethinking how their practices measure performance, develop talent and deliver client value as AI and automation change the work itself. The opportunity is no longer simply to complete more returns with fewer hours. It's to build a tax practice where technology creates capacity, professionals exercise stronger judgment and success is measured by outcomes.

## SIGNALS FROM THE ROOM

### SIGNAL 1 Performance Measurement Moves Beyond Billable Hours

Traditional utilization metrics are becoming less useful as technology accelerates tax work. Leaders are looking toward timeliness, quality, professional development and client experience to evaluate performance. This shift requires stronger workflow visibility, clearer expectations and more active leadership.

### SIGNAL 2 AI Forces a Rethink of Tax Practice Operations

AI adoption is raising bigger questions than which tools firms should use. Tax leaders are examining how technology connects across systems, changes staff responsibilities and supports higher-value services. The challenge is redesigning workflows rather than adding automation to processes that already create friction.

### SIGNAL 3 Talent Development Becomes Part of Practice Design

As routine work changes, firms must rethink how tax professionals build technical skills, judgment and leadership capabilities. Leaders are balancing new technology with the need for intentional training, coaching and meaningful career development, especially as staffing capacity and succession pressures continue.

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## 3 THINGS AUDIT LEADERS ARE TESTING

- **Outcomes-Based Performance Models**
  Replacing time-based measures with workflow dashboards, quality indicators and structured supervisory check-ins to evaluate accomplishment and accountability.
- **AI-Enabled Tax Workflows**
  Piloting AI tools for tax preparation and review while exploring how connected systems can reduce manual steps and improve delivery.
- **Standardized Pricing Structures**
  Expanding pricing matrices, minimum fees and value-based billing approaches across tax services to improve consistency and protect engagement profitability.

## WHAT WE'RE HEARING

**Efficiency Alone Isn't the Goal**
Faster production doesn't automatically create capacity. Leaders must decide what work to eliminate, redesign or redirect toward higher-value services.

**Supervisors Become Critical to Execution**
Moving beyond time entry places greater responsibility on managers to identify bottlenecks, coach professionals and keep work moving.

**The Future Practice Starts With Today's Decisions**
Rethinking the tax practice for 2030 brings current assumptions about staffing, pricing, technology and service delivery into question.

## TAKE IT BACK TO YOUR FIRM

**Measuring What Matters:** If billable hours became less relevant tomorrow, how would your firm measure quality, productivity, client experience and professional growth?

**Redesigning Work:** Where could AI and automation help your tax practice eliminate unnecessary steps rather than simply increase the volume of work?

**Preparing for 2030:** What is one assumption about your current tax practice model that needs to change, and what concrete step could you take in the next 12 months?

## CONNECT THE DOTS

The next phase of tax practice transformation requires leaders to look beyond individual technology investments and rethink how work gets done, how people develop and how success is measured. The Boomer Tax Leader Circle connects leaders navigating these decisions, providing a place to compare approaches, challenge assumptions and turn ideas into practical action.

**What would your tax practice look like if you could design it from scratch?**

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