

Your Firm Bought AI. Did It Buy You Anything?

Most CPA firms can point to their AI spending. Few can point to what it's returned.
The firms that can answer treat AI like any other firm investment.

Why the ROI gap happens

For most firms, AI arrived the way most software does: a Copilot license here, a ChatGPT account there. Then not much changes, and leadership starts asking why the investment hasn't made a dent.

Your firm would never open an office or launch a service line that way. Those start with a business case, a named leader and targets the partners agree on. AI usually skips all three.

Quick self-assessment: Where is the return fuzzy?

- Can you name one firm priority AI has measurably moved?
- Could you defend the firm's AI spend in a partner meeting?
- Does anyone own AI results, not just AI tools?
- Is success still measured by licenses and usage rather than outcomes?

If more than one feels familiar, the gains are probably real but unplanned. The fix is treating AI like any other firm investment.

19%

of tax firms using AI firmwide are measuring its ROI, according to Thomson Reuters' 2026 AI in Professional Services Report.

Common measures

- × Licenses purchased
- × Prompts run
- × Tools rolled out

Business outcomes

- ✓ Advisory capacity
- ✓ Realization rate
- ✓ Turnaround time

Five questions that show whether AI is paying off

1 Did it start with a priority or a tool?

"Use more AI" isn't a goal. Growing advisory capacity or easing busy season is, and AI should be measured against it.

2 Is someone leading it?

Every other firm initiative has a named leader with authority to decide. AI deserves the same, and it shouldn't default to IT.

3 Were the rules clear before it scaled?

Approved platforms, allowed data and who reviews AI-assisted work should be settled before adoption, not after.

4 Did you count the full cost?

Training time, added risk, build vs. buy and your team's appetite for another change all belong in the business case.

5 Did you measure what changed?

License counts tell you who logged in. A baseline taken before you start, measured again at 90 days, tells you whether it paid off.

Two ways to find your first priority

Start with the firm's strategic plan, not a list of AI tools. Look by function of the firm, then ask where freed hours would move a number the partners already watch.

Tax and research

Searching authoritative materials, summarizing findings, organizing source documents and drafting client explanations

Audit and assurance

Organizing and analyzing documents, flagging anomalies and supporting workpaper preparation

CAS and advisory

Variance analysis, reporting commentary, forecasts, scenario development and KPI analysis

Firm operations

Meeting summaries, internal knowledge search, routine communications and client intake

Bring these to your next partner meeting



Which firm priority could AI move first, and who leads it?



What number would tell us, 90 days from now, that it worked?



What are we still doing the old way that AI was supposed to replace?

Treat it like a business case



1

Pick one firm priority, not the whole firm. Tie it to the strategic plan, like growing advisory capacity.

2

Baseline it before anything changes. Then set the goal and the rules for how AI can be used.

3

Name an owner, a timeline and the full cost – training, risk and change, not just licenses.

4

Check in at 90 days. Measure the same numbers, report to the partners and be honest about what moved.

***Want a partner to think this through?
Netgain works with CPA firms to turn
AI spending into measurable results.***