

CX Pilots Releases Benchmark Report on the Future of Accounting: How Client Experience and AI Are Reshaping the Industry

CX Pilots' 2026 report reveals how AI, talent shortages, and PE deals are forcing CPA firms to switch focus from technical tasks to superior client experience.



CX Pilots

RALEIGH, NC, UNITED STATES, June 12,

2026 /EINPresswire.com/ -- CX Pilots, the leading customer experience consultancy serving professional services firms, today announced the release of "[The Future of Accounting](#): How Client Experience and AI Are Reshaping the Industry." This strategic report synthesizes 16 years of CX Pilots' work with accounting and advisory firms, alongside independent research from the AICPA, CPA.com, Stanford, McKinsey, and leading industry analysts, to provide firm leaders with a practical playbook for navigating an industry transformation already underway.

The report addresses an inflection point for the profession. AI-assisted tools now automate more than 80% of individual return preparation and cut document analysis time by roughly 50%, compressing the performance gap on routine technical work. At the same time, 75% of the current CPA workforce is expected to retire within 15 years, the U.S. accounting and auditing workforce has contracted by more than 17%, and at least 147 private-equity deals between 2020 and 2026 have created over \$200 billion in new value, reshaping ownership across the top of the market. In this environment, technical excellence is no longer a sufficient differentiator. The experience clients have in working with a firm has become the product.

"Accounting leaders are facing the most disruptive convergence the profession has seen in a generation: AI is commoditizing the work, the talent pipeline is collapsing, and private equity is rewriting the ownership map all at once," said Steven Keith, Founder of CX Pilots. "Our research is unambiguous. Firms that treat client experience as a managed system, and use agentic AI to elevate that experience rather than simply cut cost, will define the next era of accounting. Everyone else will watch their most profitable relationships quietly migrate to firms that do."

Key findings from the benchmark report include:

AI is leveling technical differentiation: Firms adopting AI-assisted tax tools report over 80% automation of individual return preparation, LLM-based research tools reduce audit and

advisory document analysis time by roughly 50%, and pilot audits in large firms have cut fieldwork cycles by up to 50%. Speed and accuracy are no longer durable differentiators.

Experience has become the product: Based on 16 years of CX Pilots client data, 83% of accounting firm clients cannot distinguish the discrete value of their CPA firm's technical output and instead judge value through proxies such as communication, responsiveness, and contextual understanding. 73% of customers say experience matters more than price, and 86% are willing to pay more for great experience.

Most mid-market firms remain at low CX maturity: The majority of accounting firms operate between Ad Hoc and Emerging stages of CX maturity, relying on one-off satisfaction surveys, partner gut feel, and ad hoc fire drills rather than structured voice-of-client programs, journey design, or governance. 88% of accounting firm clients want the opportunity to share feedback more often than once a year.

The talent and consolidation squeeze is structural: 75% of the current CPA workforce is projected to retire within 15 years, 87% of finance leaders acknowledge a talent shortage, and 83% report they cannot find qualified candidates. Meanwhile, 147 private-equity deals from 2020 to 2026 have generated \$200 billion-plus in new value, and PE firms are on track to own a significant share of the top 30 U.S. accounting firms within a few years.

CX leadership produces premium economics: Firms that systematize client experience command billing rates 15 to 20 percent above peers, convert compliance relationships into advisory engagements that generate three to five times the revenue, and benefit from the well-established finding that a 5% increase in client retention can drive 25 to 95 percent profit growth. Structured CX programs typically deliver a 3 to 5 point retention lift within 12 to 18 months.

The report introduces CX Pilots' proprietary CX Maturity Model for Accounting and Advisory Firms, a four-stage framework (Ad Hoc, Emerging, Integrated, Embedded) that allows firm leaders to benchmark current capabilities and chart an advancement strategy across governance, voice-of-client, journey design, service blueprinting, AI deployment, and partner accountability. It is paired with a phased 24 to 36 month implementation roadmap built from CX Pilots' engagements with 26 accounting firms.

"The Future of Accounting: How Client Experience and AI Are Reshaping the Industry" is now available for download at <https://www.cxpilots.com/epiphanies/the-future-of-the-accounting-industry-benchmark-report>.

About CX Pilots

CX Pilots is the world's leading customer experience consultancy serving professional services firms, with deep expertise across accounting and advisory, insurance, legal, and architecture, engineering, and construction. Since 2016, the firm has partnered with dozens of leading firms

to design and implement transformative client experience strategies that drive measurable business results. Through proprietary research methodologies, strategic frameworks, and proven implementation expertise, CX Pilots enables professional services organizations to systematically elevate client experiences, resulting in quantifiable improvements in retention, cross-sell performance, and profitability. Their evidence-based approach has positioned them as trusted advisors to firms seeking competitive differentiation through superior client experience delivery.

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