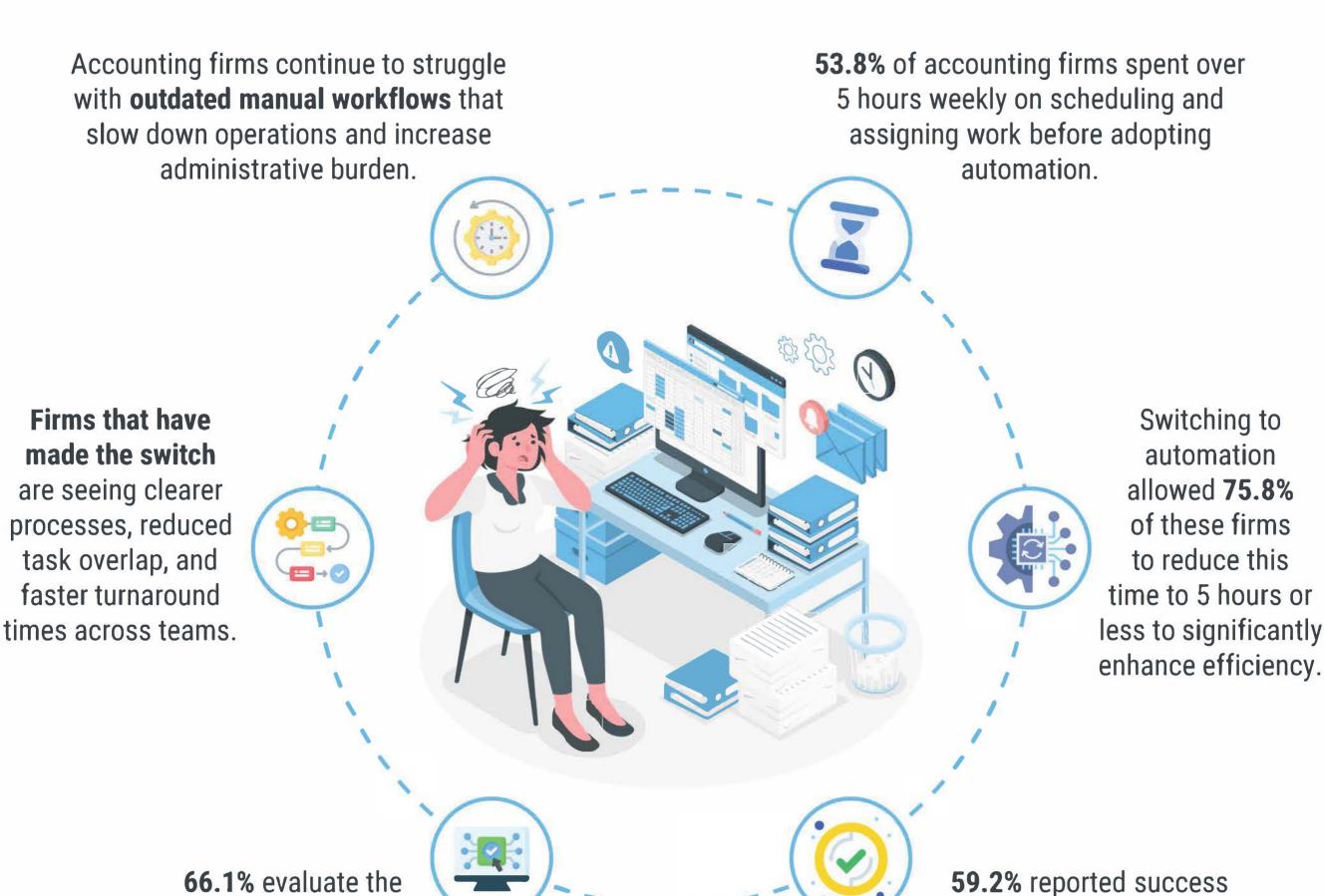
## Document Management Workflow Trends

Today's accounting firms are facing a growing list of document-related challenges-and the data tells the story. Whether you're running a mid-sized CPA firm or managing operations at a large accounting group, these insights reveal how the industry is transforming and where firms are investing to stay ahead.

## Document Workflows Are Still a Headache



## **Compliance and Security Risks**



success of workflow

automation by the smoothness

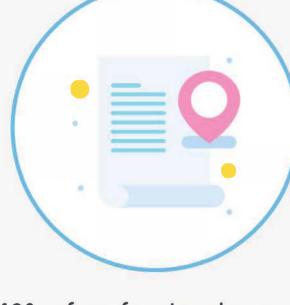
of their systems and processes.

of client data, document security and compliance management remain top concerns especially in firms still using fragmented or outdated systems.





are focused on finding better, easier ways to alleviate the burden of legal compliance requirements.



within their organizations, highlighting challenges in records management systems.



prepared to move beyond basic compliance to adopt a strategic approach.



in initial attempts at solving

workflow issues.

46% of employees report that they "sometimes or almost always" struggle to find the information needed to perform their jobs, often due to information being hidden within paper records or disparate legacy systems.



and action is clear. Firms know the risks, but few are investing in the systems and strategy needed to truly future-proof compliance.

## Adoption of Accounting Workflow Software Accounting firms are making steady progress





still stuck in transitional stages, relying on spreadsheets or outdated tools instead. 27.9% of firms are using accounting workflow software to manage their workflows.

toward automation, but a large portion are

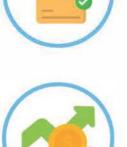


44.2% are still primarily on spreadsheets or transitioning from spreadsheets to workflow software.



management software. 71% of accounting firms utilize document

Only about 8.7% use generic project



of maintaining accurate and accessible records in the profession. 77% of accounting firms plan to increase their

technology investments over the next two years

storage solutions, highlighting the importance



engagement software for audit, review, and tax processes.

21% of these firms are specifically targeting



As more firms invest in purpose-built workflow and document tools, the gap between forward-moving firms and those

still transitioning is becoming more

visible and impactful.

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