

State of Accounting 2026

How Technology Is Shaping
the Future of Accounting

EBOOK



Foreword

By Jody Padar, The Radical CPA

Accounting has always been built on trust. When the stakes are high—financially, legally, personally—people turn to accountants for clarity, judgment and stability. That hasn't changed.

What has changed is everything surrounding the work.

Client expectations are rising. Regulatory complexity keeps accelerating. Security risks are evolving. And technology, especially automation and AI, is reshaping how work gets done faster than most firms were ever built to handle.

Yet despite all of this, one finding in this report stopped me cold: Accountants still love what they do.

That matters more than we give it credit for!

People don't fall out of love with meaningful work. They fall out of love with friction. With broken workflows. With endless manual steps. With switching between tools that don't talk to each other. With spending their days doing work that technology should have taken off their plate years ago.

That tension—the gap between the work accountants want to do and the work they actually spend their time on—is exactly what this report captures.

On one hand, accountants clearly see the opportunity ahead for deeper client relationships, more advisory work, better experiences and more fulfilling careers. On the other, they're being slowed down by systems and processes that weren't designed for today's reality, let alone tomorrow's.

And that gap matters.

Because accounting isn't just evolving. It's being redefined.

For years, transformation was framed as a technology project. Move to the cloud. Automate a few workflows. Add another tool. But AI changes the equation entirely. It doesn't just make the current firm model faster—it challenges the assumptions that model was built on.

It challenges the idea that time equals value. It challenges the notion that repetitive work is the path to expertise. And it challenges the belief that advisory is optional or reserved for a few senior people.

The firms that emerge strongest won't look like today's firms with better software. They'll operate more like accounting companies where human judgment, embedded intelligence and scalable expertise work together to deliver outcomes clients actually care about.

And no, the future isn't less human. It's more intentionally human.

As automation and AI handle more execution, value moves up the stack. Clients will always be able to buy cheaper tools. What they'll pay for is context, insight, communication and trust. They'll pay for someone who understands the business behind the numbers and can help them make better decisions when things feel uncertain.

That's why the findings in this report are so significant.

Accountants want to focus on client experience. They want to be strategic advisors. They want to do work that matters. But too much capacity is still being drained by inefficiency like manual processes, tool sprawl, insecure document exchange and workflows that create work instead of removing it.

Technology isn't the story. Capacity is!

Capacity to think.

Capacity to advise.

Capacity to serve clients better.

Capacity to retain great people in the profession.

Automation and AI aren't threats to that future. They unlock it. But only if firms stop treating them like optional add-ons and start treating them like core service-delivery infrastructure. Because once execution is automated, advisory can't live on the sidelines anymore. It becomes the operating system.

That means expertise has to be captured and scaled. Performance has to be measured by impact, not just utilization. And value has to be delivered consistently, not heroically.

This shift isn't theoretical. It's already happening.

The market is changing. Talent expectations are changing. Technology companies are entering the profession from the outside. Technical excellence alone is no longer enough. Technology becomes table stakes. Human judgment becomes the premium.

So this report isn't just a snapshot of where accounting is today. It's a mirror. And it's asking a question every firm will have to answer: If accountants already love their work, what becomes possible when we finally remove the friction that keeps them from doing it at their highest level?

This is the true future of the profession.

Introduction

Characteristics that drew accountants to the profession still hold true today. Accountants value problem-solving, stability and meaningful client work. But the day-to-day realities of modern accounting look increasingly different—shaped by technology, regulatory change and evolving client expectations.

While accountants are deeply committed to their work and to delivering exceptional client experiences, many face challenges that slow them down. Fragmented tools, inefficient workflows as well as complex security and compliance requirements all compete for attention. At the same time, emerging technologies like automation and AI offer unprecedented opportunities to streamline processes, enhance service and free professionals to focus on strategic, value-added work.

This report explores how these forces intersect, highlighting both the successes and the gaps that will define the accounting landscape in the coming year.

About the Survey

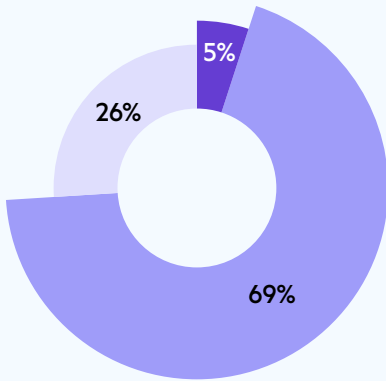
The Progress® ShareFile® team commissioned Regina Corso Consulting to conduct a survey of accountants to better understand their thoughts on the profession, where it is going and how it is and isn't changing.

This survey is among 311 U.S.-based accountants, with 158 who work in accounting/tax/audit/bookkeeping firms and 153 who work in-house at corporations/companies.



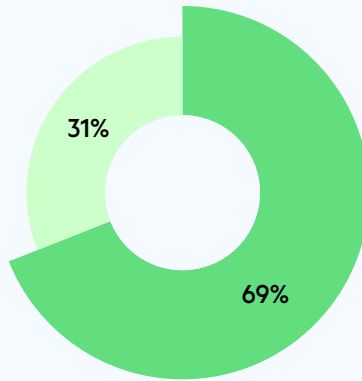
Demographics

Age



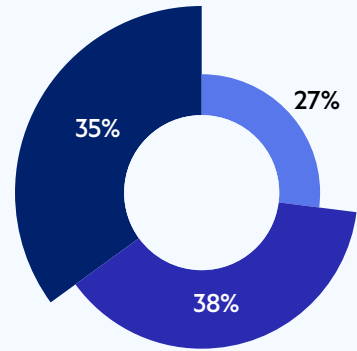
- 18-35
- 36-54
- 55 or older

Gender



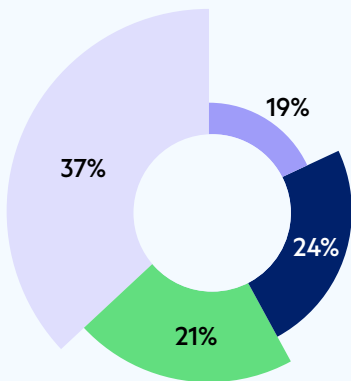
- Women
- Men

Title



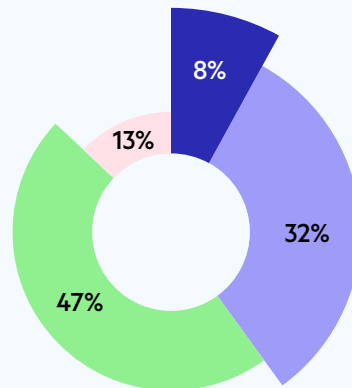
- Managers
- Directors
- Senior Executives/VPs

Size of company



- 10-249 employees
- 250-500 employees
- 501-1,000 employees
- Over 1,000 employees

Time in field



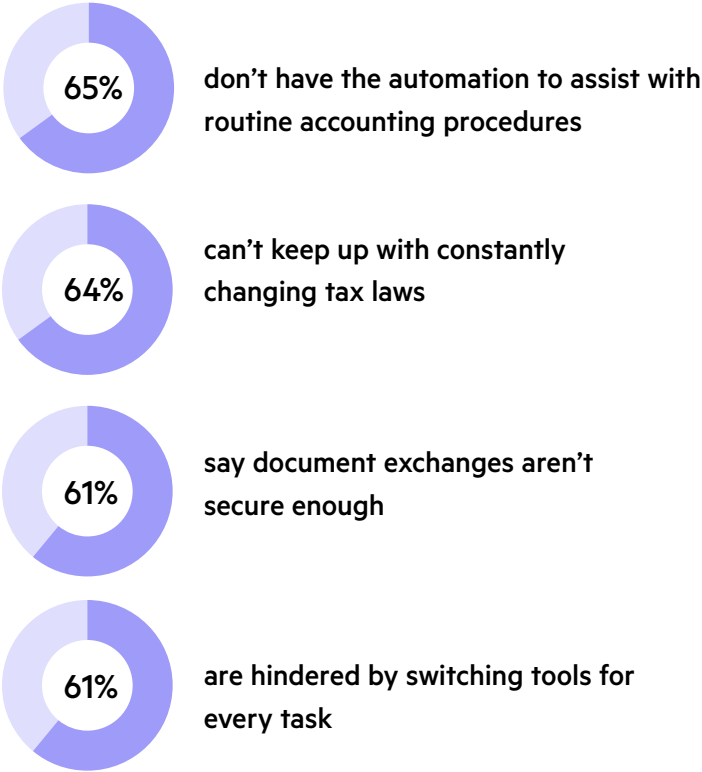
- 5 years or less
- 6-10 years
- 11-20 years
- Over 20 years

Executive Summary

Few professions can boast the job satisfaction accounting does. Almost every accountant (98%) says they love their work—especially the problem solving (50%) and career stability (50%) that come with it.

Their number one focus? Client experience. It's a top priority to accountants, both personally (97%) and to their firms/companies (98%). But it's not the easiest benefit to provide.

Ninety-eight percent of accountants say they need technology that effectively streamlines processes and improves workflow efficiency. That's because for many (75%), current workflows have too many steps. And when workflows aren't streamlined, other challenges quickly follow:



What can help is **automation**. Yes, 84% of accounting work is already automated, but the majority of accountants (60%) say only some of their tasks are. Their largest barriers? Integrating new systems, security risks and budgetary concerns. Even 20% say their largest barrier is that **leadership is resistant to change**. Yet, almost all (97%) believe automation can enhance the experience accountants provide.

AI is also doing its part to help accountants. Already, 84% say they use AI in the workplace to summarize documents, support stronger security and craft strategies for clients. And as adoption continues to evolve, teams are learning and refining how they use AI—staying mindful of key considerations like privacy, bias and data accuracy. Others are simply watching closely as the technology continues to shape the profession’s future.

No matter the problems accountants face, we found they can’t be blamed on differences in generational tech savvy. While there are slight differences in thinking between firm sizes, no overarching themes arise by accountant title or years in the business. That means these issues span the industry, not just among older accountants who are unwilling to change.

How to Use This Report

Each section of this report showcases the positives of modern accounting processes and technology. But it also highlights the current pitfalls the industry must address to efficiently serve clients, stay profitable and keep accountants’ job satisfaction high. After seeing how your office or firm’s views compare to those of hundreds of other professionals across the country, use this report to seek out accounting technology and solutions that directly address current gaps.

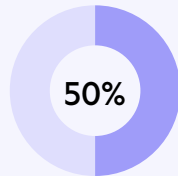
Trend #1: Accountants Love Their Jobs, But They’re Not Without Challenges

Accountants are passionate about their work, valuing problem-solving, career stability and meaningful client impact. Yet even with high job satisfaction, inefficiencies—especially around technology—can make it challenging to perform at their best.

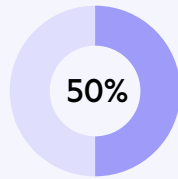


The Upside: Accountants Enjoy Problem-Solving and Career Stability

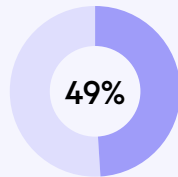
Accountants are happy with their jobs—98% like their jobs most of the time and 96% really like the work they do. What qualities do they enjoy most?



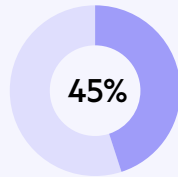
say being able to problem-solve



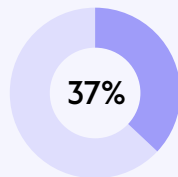
say career stability



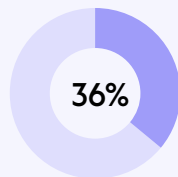
say working with great colleagues



say good salary



say they like working with numbers



say helping people and/or clients

While problem-solving is a big part of the job, almost all accounting professionals (96%) say they are critical advisors, not just number crunchers. This makes it imperative for accountants to have time and capacity to focus on strategy and client experience.

The Challenge: Efficiency Lags Behind Effectiveness

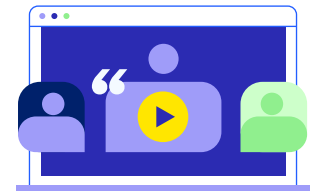
The problem with delivering on client experiences is that 57% of accountants say they can perform their job effectively but not efficiently, often due to technology issues. While some (64%) say constantly changing tax laws keep them from being efficient, technology poses a bigger problem due to:

- Lack of the right technical resources to do their job on a regular basis (67%)
- Lack of automation to assist with routine accounting procedures (65%)
- Unsecure document exchanges (61%)
- Too many tools to switch between for every task (61%)

Even worse, a tech-adverse office culture (57%) keeps them from obtaining the tools they need. Very few accounting professionals (4%) say they have no problems at all.

Watch on-demand webinar “Client Experience as a Growth Strategy” to learn how leading accounting firms use technology to win and retain clients.

[Watch Webinar](#)



The Opportunity: Remove Everyday Friction

Accountants don't need to work harder—they need better systems. The biggest opportunity for firms is to eliminate the everyday friction that slows work down and pulls focus away from clients. By streamlining how documents are shared, automating routine steps and reducing the number of tools teams juggle, firms can free up hours every week. With automated accounting, teams can simplify onboarding, keep engagements moving with built-in workflows and securely exchange documents in one place.

Trend #2: Actual Client Experiences Don't Yet Match Opportunities

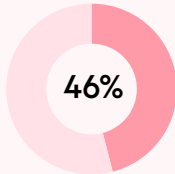
Even as accountants recognize the importance of delivering exceptional client experiences, there's still a gap between intent and reality. Many see opportunities to elevate service, but workflow inefficiencies and underused technology often stand in the way.

The Upside: Client Experience Is Accounting's Top Priority

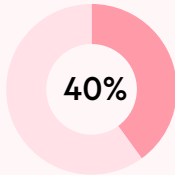
Most accountants agree the client experience is crucial. In fact, it's what they say is most important to them personally (97%) and to their firms/companies (98%).

The Challenge: Inefficiency Detracts from Good Client Experiences

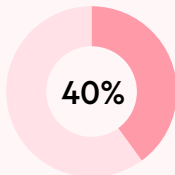
While only 12% of accounting professionals say it's somewhat difficult to provide a good client experience, the positive end of this spectrum skews toward the middle: 50% say it's only somewhat easy to provide. It's possible this is due to distractions and other inefficiencies. But what accountants say what would help most are:



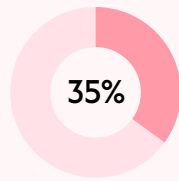
Personalized services



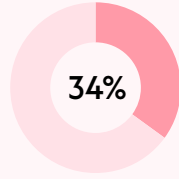
**Focused client advisory/
strategy versus mundane tasks**



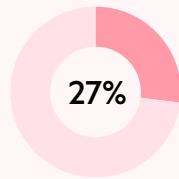
Streamlined client collaboration



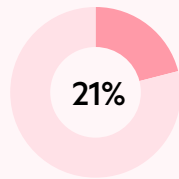
Simplified technology



Updated technology



More technology



Expanded staff

A whopping 96% say technology is the key to improving the client experience. Yet, many still haven't fully taken advantage of the available tools.

Client Experience as a Growth Strategy: 3 Ways Accounting Firms Win and Retain Business

Explore how accounting firms can elevate the client experience to drive efficiency, strengthen relationships and support long-term growth.

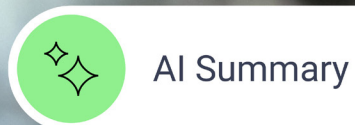
[Learn More](#)

The Opportunity: Deliver on the Client Experience

Knowing the importance of client experience isn't the same as delivering on it. Firms must turn good intentions into consistent, standout experiences by fixing what slows them down. Automated accounting software helps firms act on what clients actually want—smoother collaboration, faster turnaround times and more personalized service. By automating routine tasks, centralizing client interactions and making document exchange simple and secure, firms can shift time away from busywork and toward advisory conversations.

Looking Ahead: AI

Among those who say having more or updated technology would make it easier to provide better client experiences, 33% point to AI tools as the top solution. [Check out page 17](#) of this report for a deeper dive.



Trend #3: Tool Sprawl and Missing Tech Slow Accountants Down

Accounting professionals see enormous potential in technology, but, too often, the right tools are out of reach or overly complicated. While technology promises efficiency and more opportunities for positive client engagement, the reality is that navigating a crowded tech landscape can be a major hurdle.

The Upside: Efficiency Requires Technology

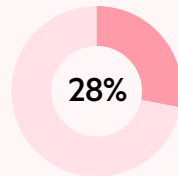
Most accountants recognize the benefits of modern tools. More than nine in ten accountants say better technology would allow them to do more of the work they enjoy. Plus, nearly all (98%) agree they need solutions that streamline processes and improve workflow efficiency.

Larger firms and accounting practices tend to be more up to date, leveraging AI and automation, while smaller or in-house teams often lag behind.

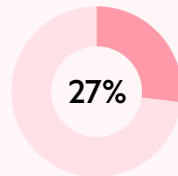


The Challenge: The Ability to Move Fast Is Still Over the Horizon

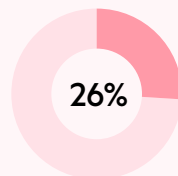
Speed is still elusive. While accountants believe in the power of technology, many are still disillusioned:



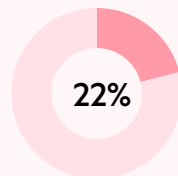
cite having too many tools



don't have enough of the right technology



have outdated systems



blame overly complex software

The answer may lie in fewer, yet well-integrated tools that can unlock seamless workflow automation. Accountants see technology driving efficiency (39%) in the next few years, with meaningful impacts on service growth (24%), client experience (20%) and even job satisfaction (17%).

The Opportunity: Slim Down, Speed Up

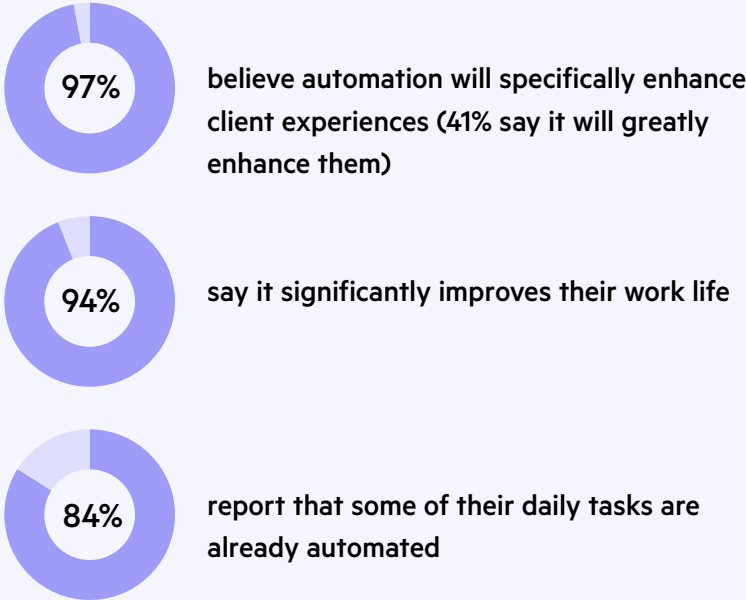
Fewer platforms, smarter automation and built-in workflows can remove the complexity that slows teams down. With an integrated, easy-to-use accounting management system, firms can replace tool sprawl and outdated systems, consolidating core tasks to move faster without adding friction. This results in smoother handoffs, less time clicking between tools and, ultimately, better client service.

Trend #4: Automation Holds Promise

Automation has become a trusted differentiator for accounting, with professionals agreeing it can streamline workflows and enhance client experiences. Yet, despite high enthusiasm, many teams struggle to fully integrate automation into their day-to-day work. Does this mean automation is more trouble than it's worth?

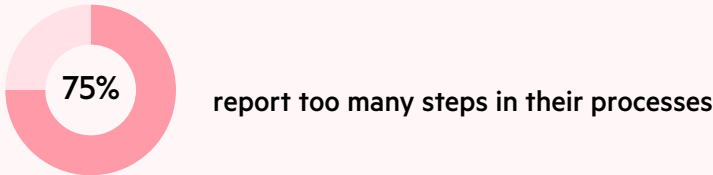
The Upside: Automation Is Trusted and Impactful

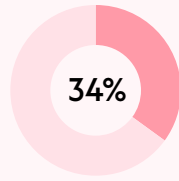
Accountants widely believe that more automation leads to better client experiences. Nearly all see its value:



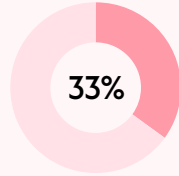
The Challenge: Full Adoption Remains Elusive

Even with widespread recognition of its benefits, only 24% of accountants say a great deal of their tasks are automated. The reasons are primarily technical:

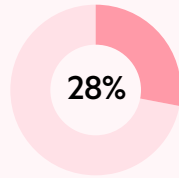




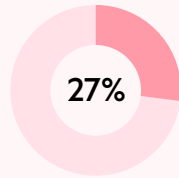
blame integration challenges



cite security concerns



point to budget constraints



look to limited skilled resources

Others point to leadership as the reason their automation isn't better, citing resistance, a lack of ownership and fear of technology. Only 2% say they have no barriers to adopting automation, indicating that **nearly all teams face hurdles to scaling automation.**

The Opportunity: Put Automation to Work

Automation is a game-changer. Move past partial adoption and make automation a natural part of daily workflows for streamlined, integrated workflows that cut out repetitive steps, reduce errors and free up time for high-value work. By tackling process bottlenecks with connected accounting workflow software, firms can turn automation from a nice-to-have into a true efficiency driver.

Trend #5: Accounting AI Is Becoming Mainstream

AI adoption is growing rapidly, with accountants recognizing its potential to streamline work, improve client outcomes and support strategic decisions. Yet while [usage is widespread](#), meaningful adoption and clear guidelines remain inconsistent.

The Upside: AI Is Widely Adopted and Versatile

Today, 84% of accounting professionals use AI at work—29% a great deal and 55% somewhat. But their use spans diverse cases, from summarizing documents (39%) and supporting security practices (37%) to shaping client strategies (34%), validating and routing documents (33%) and researching tax laws (29%).

Most accountants see even more potential ahead: 44% say AI will have the greatest impact on efficiency, 25% on client experience, 19% on strategy and 12% on advisory services.

The Challenge: AI Governance Is Still Evolving

Despite enthusiasm, AI adoption still comes with important considerations. Only three in ten accountants use AI extensively, while [data privacy/security](#) (29%) and bias (26%) remain top of mind.

Governance also varies across organizations, which many accountants cite as a key area to address. Only 39% of accountants surveyed say their firms have strict policies. Twenty-nine percent have unenforced policies, 20% rely on informal guidelines and 11% have none.

Like other professionals across industries, some accountants also worry about potential impact on their roles (16%), loss of hands-on control (8%), diminished human judgment (7%) and difficulty handling complex tasks (6%).

The Opportunity: Choose Tech Responsibly

Using AI comes with great responsibility, especially for accountants who work with private data every day. The key is choosing trusted, reliable tech that is secure, reliable and [aligned with regulatory requirements](#) like HIPAA, SEC and FINRA. This way, firms can move and work freely without stopping to manage risk at every turn.

Trend #6: Security, Risk and Regulation Greatly Impact Accounting Work

Evolving rules and regulations continue to challenge accounting teams, but technology—particularly automation—can still help maintain compliance and manage complexity.

The Upside: Automation and Knowledge Capture Ease the Burden

Even as tax laws and regulations change constantly, technology enables teams to track updates, summarize new guidance and route critical information into workflows efficiently. Automation and structured knowledge capture help accountants stay on top of compliance without losing focus on client service.

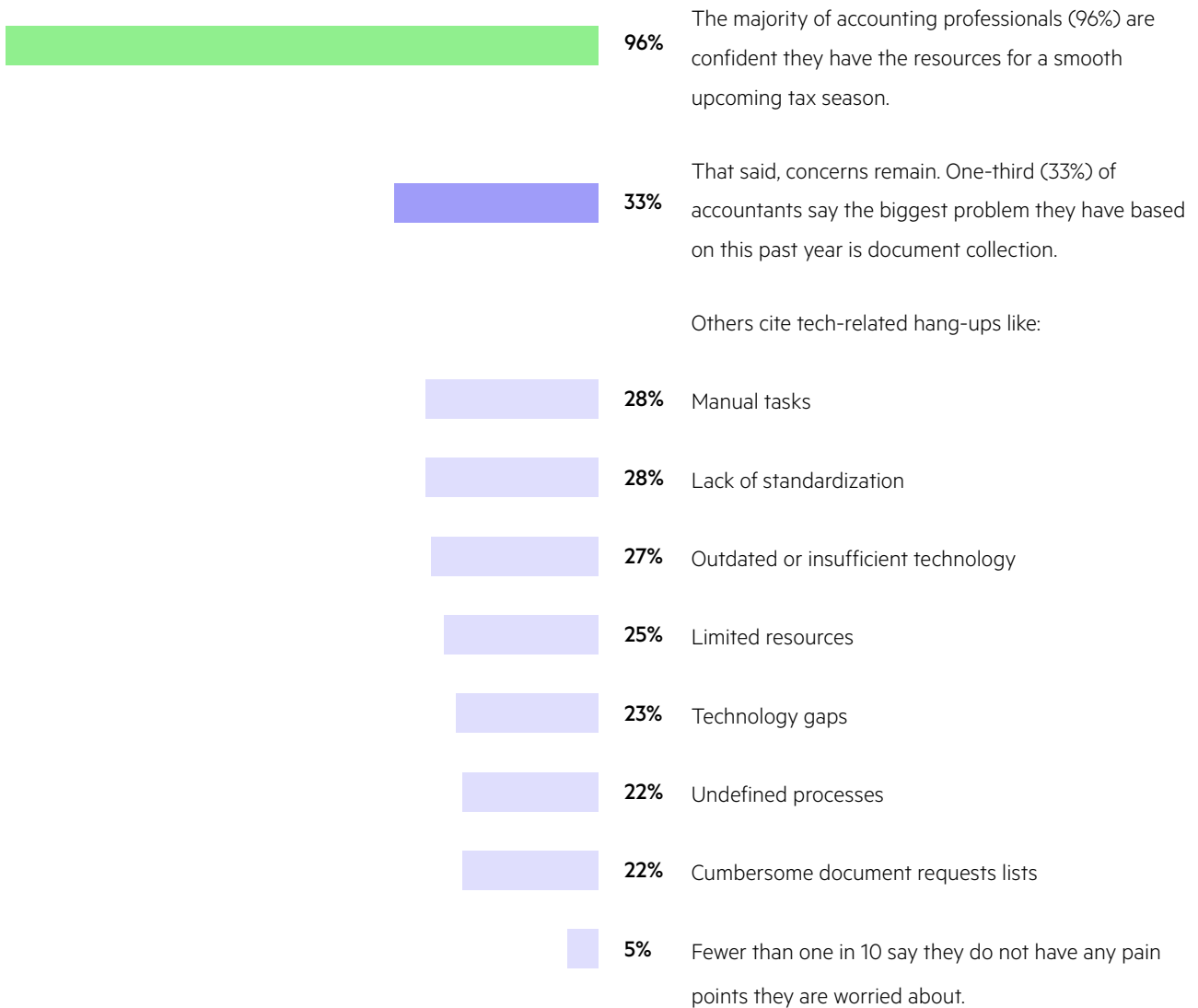
The Challenge: Security Is the Top Barrier to Efficiency

[Data security](#) remains one of accountants' biggest everyday hurdles: 22% cite it as their largest problem and 38% say technology itself introduces too much data risk. Alarmingly, 61% say they regularly deal with unsecure document exchanges.

The Opportunity: Make Security a Strength, Not a Roadblock

There's no place for vulnerability in a world of increasing cyber risk. When working fast wins out over staying safe, firms increase their exposure to major threats. The key is adopting automated systems that work with compliance, to make it easy for firms to manage changing tax rules and regulations, keep sensitive information safe and reduce risky manual processes.

What Will the Tax Season Bring?



About Progress ShareFile Software

Secure, All-In-One Document Collaboration for Accounting

The digital-first mentality is rapidly evolving the accounting landscape. Clients are expecting more modern and elevated experiences from organizations that extend beyond expected service. In fact, 73% of people in a recent study point to client experience as an important factor in their purchasing decisions.

With this in mind, accounting firms must focus on improving the client experience to retain and attract new clients.

ShareFile automations give accounting teams time-saving and key built-in workflows that keep engagements moving. Client-facing processes, such as onboarding, are simplified and accelerated, creating better experiences. Plus, teams can deliver services faster and refocus on higher-value tasks. ShareFile software does all of this without compromising data security.



“ShareFile is viewed as a ‘non-issue’ platform—one that quietly powers secure client connections and helps Jitasa’s team feel part of something bigger than routine accounting work. It’s a true ‘send it and it’s done’ experience, with automated routing, notifications, and document storage, plus easy remote access for sales and client service.”

Tiffany Hylton, Director of Accounting Services, Jitasa



Learn how accounting firms put client experience to work—and watch the on-demand expert discussion for practical guidance.

About Progress Software

[Progress Software](#) (Nasdaq: PRGS) empowers organizations to achieve transformational success in the face of disruptive change. Our software enables our customers to develop, deploy and manage responsible AI-powered applications and personalized digital experiences with agility and ease. Businesses of all sizes get a trusted provider in Progress, with the products, expertise and vision they need to turn AI disruption into a competitive advantage. Millions of developers and technologists at hundreds of thousands of organizations depend on Progress every day. Learn more at www.progress.com

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