



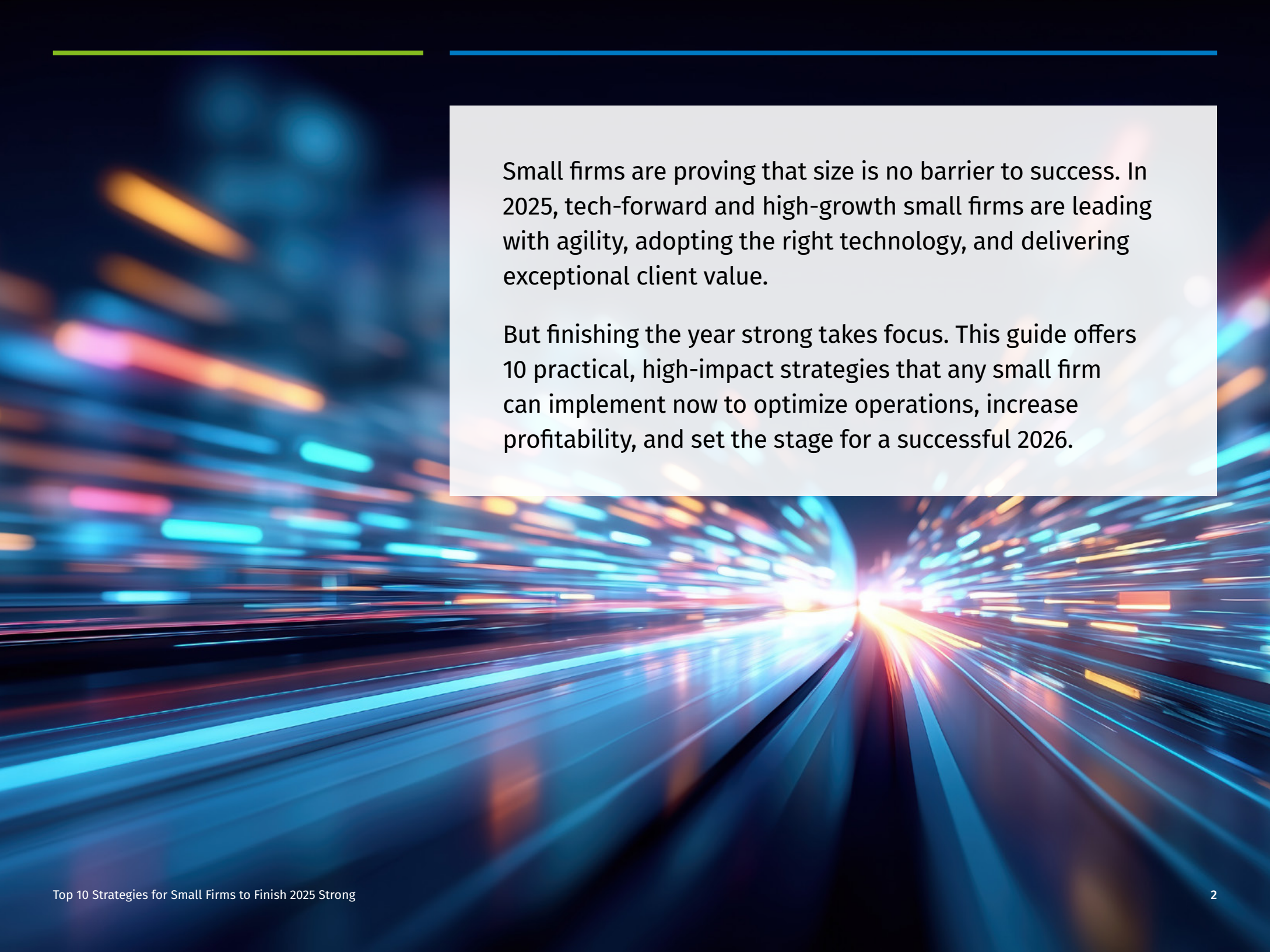
Tax & Accounting

Top 10 Strategies for Small Firms to Finish 2025 Strong

Practical actions you can take now to increase efficiency, profitability, and confidence heading into 2026.



Wolters Kluwer



Small firms are proving that size is no barrier to success. In 2025, tech-forward and high-growth small firms are leading with agility, adopting the right technology, and delivering exceptional client value.

But finishing the year strong takes focus. This guide offers 10 practical, high-impact strategies that any small firm can implement now to optimize operations, increase profitability, and set the stage for a successful 2026.

Strategy #1: Streamline your tech stack

Save time, reduce frustration, and avoid costly errors through a simplified tech setup.

Small firms are under pressure to do more with less. Many are using a patchwork of older software, spreadsheets, and tech tools that don't "talk" to one another, creating inefficiencies and increasing error risk. A streamlined, integrated tech stack saves time and keeps everyone on the same page.

Recommendations:

- Focus on cloud tools that integrate to prevent redundant data entry and minimize errors.
- Remove unused or redundant software to reduce subscription expenses and simplify training.
- Identify solutions designed for small teams with easy onboarding to prevent disruptions during your busiest times.

Getting started: Conduct a basic software audit.

- Review all of the technology you're using. Don't forget to include tools you may be paying for but are not using.
- Identify where the same data is entered multiple times.
- Flag redundant tools that could be consolidated.
- Identify opportunities to consolidate tools or migrate into an integrated platform.



Tech stack recommendation:

[CCH Axcess Tax Essentials](#), a scalable professional cloud tax solution that integrates tax, planning, and workflow, built and designed specifically for smaller firms.

Strategy #2: Adopt an integrated digital tax workflow

Improve accuracy, speed, and client service by moving from disconnected steps to a unified, automated process.

Many small firms still depend on manual checklists, email attachments, and disconnected tax preparation software. This slows down your firm by creating bottlenecks, review delays, and inconsistent quality, especially during deadlines. Integrated workflows enhance accuracy and boost client satisfaction.

Recommendations:

- Map out your current tax process to identify redundant or manual handovers that slow you down.
- Centralize prep, review, and filing to ensure information flows automatically, saving hours and reducing errors.
- Use cloud reminders and collaboration tools to ensure work moves forward without constant follow-ups while keeping staff and clients aligned and deadlines on track.

Getting started: Streamline a commonly used workflow.

- Look for handoffs or bottlenecks where delays happen.
- Consolidate steps so documents and data flow through one connected process.
- Document the new process so your team can consistently follow it.



Tech stack recommendation:

[CCH Access Tax Essentials](#) and [CCH Access Engagement Essentials](#), automate key processes such as trial balance grouping, tax code assignments, and financial statement creation, integrated with any CCH Tax solution.

Strategy #3: Automate low-value tasks

Free your team to focus on advisory and client relationships, not admin.

Firms tend to waste valuable hours on repetitive work, such as chasing e-signatures, routing documents, and sending reminders. These low-value tasks distract clients. Your team's time should be spent on client relationships and higher-value work.

Recommendations:

- Automate signature requests to speed up approvals and reduce client delays.
- Automate document routing to prevent lost files and make sure tasks automatically go to the correct team member.
- Set up recurring deadline reminders to reduce last-minute client submissions and fire drills.

Getting started: Automate troublesome tasks.

- Identify at least two tasks that take up staff time but don't require judgment (e.g., deadline reminders, document routing).
- Create a standardized process so these tasks can run automatically.
- Communicate the new approach to your team to ensure adoption.



Tech stack recommendation:

[CCH Axcess Tax Essentials](#)

automates task assignment, routing, and deadline tracking, creating efficiencies for smaller firms.

Strategy #4: Enhance client communication and experience

Improve client satisfaction and efficiency by making communication seamless and secure.

Clients expect their accountants to provide the same digital experience they get from banks or online retailers: quick, intuitive, and secure. Small firms that rely on email and ad-hoc file sharing risk miscommunication, lost documents, and frustrated clients.

Recommendations:

- Centralize all client communication and document exchange in a single platform so nothing gets lost in email.
- Provide clients with secure 24/7 self-service access to documents, reducing inbound calls and support emails.
- Use built-in status tracking so clients always know where their return or project stands, improving transparency.

Getting started: Create visibility into a high-volume, recurring process.

- Identify one recurring client process that causes bottlenecks or confusion.
- Standardize how information is shared for this process.
- Provide clients with a secure, reliable way to track engagement status or upload documents without relying on email.



Tech stack recommendation:

[CCH Axcess Client Collaboration](#)

provides secure, centralized communication and document sharing designed to simplify client interactions.

Strategy #5: Optimize pricing and service packages

Improve profitability and client clarity with well-structured, transparent service offerings.

Many small firms underprice or overdeliver, which erodes margins. Clients often aren't clear on precisely what they need or want, leading to scope creep and frustration.

Recommendations:

- Review top services for profitability and identify which services take more time than they generate in revenue.
- Create bundled service packages that clarify pricing and minimize the need for one-off work. Bundling boosts perceived value while stabilizing workload.
- Consider tiered offerings so clients can choose based on their needs and budget.

Getting started: Analyze your top 3 service offerings this month.

- Compare the effort to deliver each service against its billed amount.
- Adjust pricing where margins are thin.
- Create clear, bundled offerings to increase value and reduce ad-hoc requests.



Tech stack recommendation:

[CCH Axxess Tax Essentials](#)

supports flexible service models and scalable licensing to align with evolving offerings.

Strategy #6: Leverage AI for insights & decision-making

Make faster, smarter decisions with AI-powered insights and research.

Small firms don't have teams of specialists to dig into complex tax issues. Manual research can take hours and risks missing key details.

Recommendations:

- Use AI-powered research to quickly find, confirm, and clarify tax answers, saving hours and improving accuracy.
- Apply AI-assisted document review to speed up analysis and flag potential risks.
- Train your team on interpreting AI-generated insights so they're confident using the tools.

Getting started: Reduce time spent on research.

- Identify a recurring research or analysis task that consumes significant time.
- Compare how quickly and accurately you can address it with AI-assisted research or review tools.
- Integrate the faster approach into your team's standard process.



Tech stack recommendation:

[CCH AnswerConnect Essentials](#) is an AI-enhanced, editorially curated tax research software package designed for smaller firms.

Strategy #7: Prioritize data security & compliance

Build trust and reduce risk with security practices that are strong yet simple to manage.

Cybersecurity threats are rising. Small firms are prime targets because while they hold valuable client data, they often have fewer resources dedicated to security, and disconnected tools and email exchanges increase risk.

Recommendations:

- Keep all client data in secure, integrated systems to reduce the risk of breaches from unsecured channels.
- Enforce multi-factor authentication for every user to add a critical layer of protection.
- Standardize file exchange through encrypted cloud systems instead of email to ensure compliance.

Getting started: Perform a 15-minute security check this month.

- Review how sensitive client data moves through your firm, and all user access to client files.
- Update passwords and enable MFA for your core tools.
- Identify where confidential files leave secure systems (e.g., email attachments, local drives).
- Ensure all staff consistently use secure channels to protect every client interaction.



Tech stack recommendation:

[CCH Axcess](#) is a secure, cloud-based tax, workflow, and client data management hub with encryption, MFA, and compliance built in.

Strategy #8: Focus on talent retention & upskilling

Keep your team engaged, adaptable, and loyal by investing in their growth.

In a small firm, losing one team member can create significant strain. Training gaps also slow down workflows and limit the firm's ability to grow or adopt new services. Upskilled staff improve efficiency and stay engaged.

Recommendations:

- Provide training on cloud tools so staff are comfortable and efficient.
- Offer opportunities to learn advisory skills to expand the firm's value to clients.
- Use software with built-in learning resources so onboarding new hires is fast and consistent.

Getting started: Boost your team's confidence.

- Identify one area where your team could be faster or more confident (e.g., workflow management, client communication).
- Schedule a short training or peer session to share best practices.
- Encourage open feedback on what tools or processes slow the team down.



Tech stack recommendation:

[CCH Axcess Tax Essentials](#)

provides intuitive onboarding and free do-it-yourself (DIY) style training materials for small firm adoption.

Strategy #9: Monitor KPIs to track success

Keep your firm agile and profitable by tracking the right metrics.

While relying on intuition for key decisions is tempting, without tracking a few key metrics, it's easy to miss inefficiencies or revenue leaks. What gets measured gets managed, and keeping an eye on essential metrics helps you stay flexible and in control.

Recommendations:

- Monitor turnaround time to identify bottlenecks.
- Track realization rates to ensure work is profitable.
- Review revenue per client to see where higher-value opportunities exist.

Getting started: Make KPI tracking part of the process.

- Select two performance metrics that best reflect your firm's health.
- Track them weekly using simple dashboards or reports.
- Discuss trends in monthly meetings to adjust resources before minor issues become big ones.



Tech stack recommendation:

[CCH Axcess Tax Essentials](#) includes built-in reporting dashboards for monitoring firm KPIs.

Strategy #10: Plan ahead for 2026

Start the new year strong with a clear roadmap and realistic capacity plan.

Effective year-end positioning begins with proactive planning. Many small firms delay their planning until January to plan for busy season, resulting in a last-minute rush and capacity crunches.

Recommendations:

- Forecast staff capacity based on last year's performance and upcoming demand.
- Identify technology gaps that could slow you down in Q1.
- Prioritize process improvements that deliver high ROI early in 2026.

Getting started: Hold a short planning session before December.

- Review your capacity and efficiency from 2025.
- Identify 2–3 improvements (staffing, processes, or tools) that will have the biggest impact in Q1 2026.
- Assign ownership so they're ready to go before busy season.



Tech stack recommendation:

[CCH Axcess Tax Essentials](#)

scales with firm growth, maintaining consistent workflows at higher volumes.

Conclusion

You don't need a big team to finish the year strong; you need the right strategies, tools, and focus. Adopting even a few strategies will allow your firm to finish 2025 more efficiently, profitably, and confidently.

Explore small firm solutions:

[CCH AnswerConnect Essentials](#)

[CCH Axxess Tax Essentials](#)

[CCH Axxess Engagement Essentials](#)

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