BTC · CLIENT CASE STUDY

AI Portfolio Case Study: Regional CPA Firm

How a 105-employee CPA firm set aside "autonomous tax returns" and launched five AI use cases it could defend · 6-month engagement

business technology consulting inc.

~2,400 hrs/yr recovered

6.2 → 2.8 days to signed engagement

1.8 → 3.1 AI Maturity Score

THE PROBLEM

What Leadership Wanted

- Autonomous tax return preparation
- AI-assisted audit workpapers
- GL anomaly detection
- Predictive client churn & upsell

What Was Actually Happening

- Scattered pilots
- No single owner for AI decisions
- Client data spread across SharePoint, local drives & portals
- Jr staff eager to adopt; partners hesitant

The Risk

- Preparer liability (IRC §6694) with no insurer coverage position
- Audit documentation & independence exposure
- False positives eroding client trust

THE DIAGNOSIS

AI Maturity Assessment

(Weighted Model)

Domain	Current		Target
AI Strategy	1.5	→	3.0
AI Value	1.0	→	2.5
AI Organization	2.0	→	3.5
AI People & Culture	1.5	→	3.0
AI Governance	1.0	→	2.5
AI Engineering	2.5	→	3.5
AI Data	2.0	→	3.0

AI PORTFOLIO

KEY INSIGHT

The firm's ambitions outran its foundation. With Governance at 1.0 and Data at 2.0, the Maturity Constraint Line sat at 1.5: no high-risk use case could launch safely.

THE SOLUTION

AI Portfolio Approach

Phase 1 — Assess

- AI Maturity Assessment
- 12 use cases across Tax, Audit & OPS
- Scored on value, complexity & risk

Phase 2 — Structure

- 5 use cases launched below Maturity Constraint line
- AI Steering Committee
- Centralized AI Risk Register

Phase 3 — Scale

- Document ingestion, tax research
- Scheduling forecast, client onboard
- Quarterly maturity re-scoring

RESULTS

Operational Impact

- **~2,400 hrs/yr** recovered
- Tax research: **3.1 → 0.8 hrs** per
- **18% less** scheduling utilization variance

Risk & Compliance

- Signed engagements: **6.2 → 2.8d**
- **34% fewer** onboarding calls

Governance & Maturity

- AI Maturity Score: **1.8 → 3.1**
- **4 of 7** domains above the Constraint Line

NOT YET — BY DESIGN

- **Autonomous tax returns:** after Governance 3.0 & insurer sign-off
- **AI audit workpapers:** after AICPA guidance & output logging
- **GL anomaly detection:** after client data is normalized

They didn't accelerate AI. They built the environment that made it safe to scale.

> We came in thinking AI meant autonomous tax returns. BTC helped us see that the path to those ambitions runs through fundamentals we hadn't built yet — governance, data quality, and organizational readiness. The five use cases we launched are generating real value today, and we have a clear roadmap to the high-impact cases we actually want.
>
> - Managing Partner, *Confidential client*