

Go paperless the smart way: 7 steps to running a future-ready accounting firm

A step-by-step guide to going paperless with expert tips
from Brian Davis, CPA, CFE, CEO of One Stop CPA.

Step 1. Identify where paper still lives

Get a clear picture of where paper still shows up. Carry out a thorough audit, examine your service lines, and look for any manual handoffs.

The key is to be thorough to prevent paper bottlenecks, which can still crop up when you least expect them.



Even the most digital firms can have hidden ‘bottlenecks.’ In my case, this was internal firm assets – things like SOPs, internal checklists, and templates that lived on separate drives or were shared inconsistently. TaxDome’s Wiki Pages completely solved that.



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CPA, CFE

Step 2. Document your existing workflows

Document your processes: who does what, in what order, using which tools, and where client input fits in. This will make it much easier to recreate your workflows digitally.

While you’re at it, take advantage of this stage to identify and note areas for improvement.



Documenting workflows isn’t about creating a manual that collects dust – it’s about building a living system that keeps improving. Inside TaxDome, I’m constantly refining our pipelines to make them scalable.

Step 3. Choose software that fits your workflow

With your processes mapped out, it's time to find a platform that can support them.

In addition to opting for an end-to-end platform, Brian recommends looking for three key factors: security, client usability, and team fit.



If your team actually enjoys using the software and buys into new features, you'll get the most value out of it. The best software isn't the flashiest or most expensive one – it's the one your team and clients both adopt without hesitation.



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Step 4. Create repeatable templates

Templates are where the transition starts to pay off.

By creating repeatable templates, you can standardize folder structures, engagement emails, task lists, client onboarding processes, and more.



Instead of emailing back and forth asking for last year's tax return, we built a simple 'Client Request' in TaxDome that automatically sends the same request to every new client as soon as they're invited. It's such a small change, but it saves hours every week.

Step 5. Set up your workflows in the system

Start building out your workflows. Create pipelines for each service, link tasks and due dates, and map out client-facing steps.

Test out your workflows on the client side using test accounts, and use automation to add value — not decrease it.



Automation should make your firm more human, not less... The key is knowing your clients and when automation stops adding value. Technology should handle the repetitive stuff so you and your team can focus on relationships, strategy, and real conversations.



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Step 6. Train your team

Make sure your team knows not just how to use the new system, but why the process is changing and how it benefits them.

At the same time, lead by example so that everyone follows the same system and stays aligned.



The key is giving them ownership within the process. Show them how it makes their work easier. Once your team understands the “why”, the buy-in happens naturally. Most resistance comes from uncertainty, not unwillingness.

Step 7. Help your clients adjust

Clients don't need handholding, but they do need clarity over all changes, why they're happening, and when.

Communicate and show the value of your new process to them, and be ready to provide resources and guidance to help them adopt the new system.



The key is framing it as a long-term improvement, not just a one-time change. I'd say, 'We're setting this up so things run smoother every year from here on out.' That gave clients confidence this wasn't just for my convenience – it was for theirs too.



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CEO of One Stop CPA

The final takeaway? It starts with mindset; not software

The tools will always evolve – but if your firm has a culture of testing, learning, and adapting, you'll stay ahead no matter what changes. The firms that win long-term are the ones that stay curious, keep refining, and use technology to make their firms more human, not less.



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Go paperless and build a future-ready firm with **TaxDome** – an end-to-end practice management platform with centralized tools and top-rated mobile apps, providing a unified, user-friendly experience for both teams and clients.