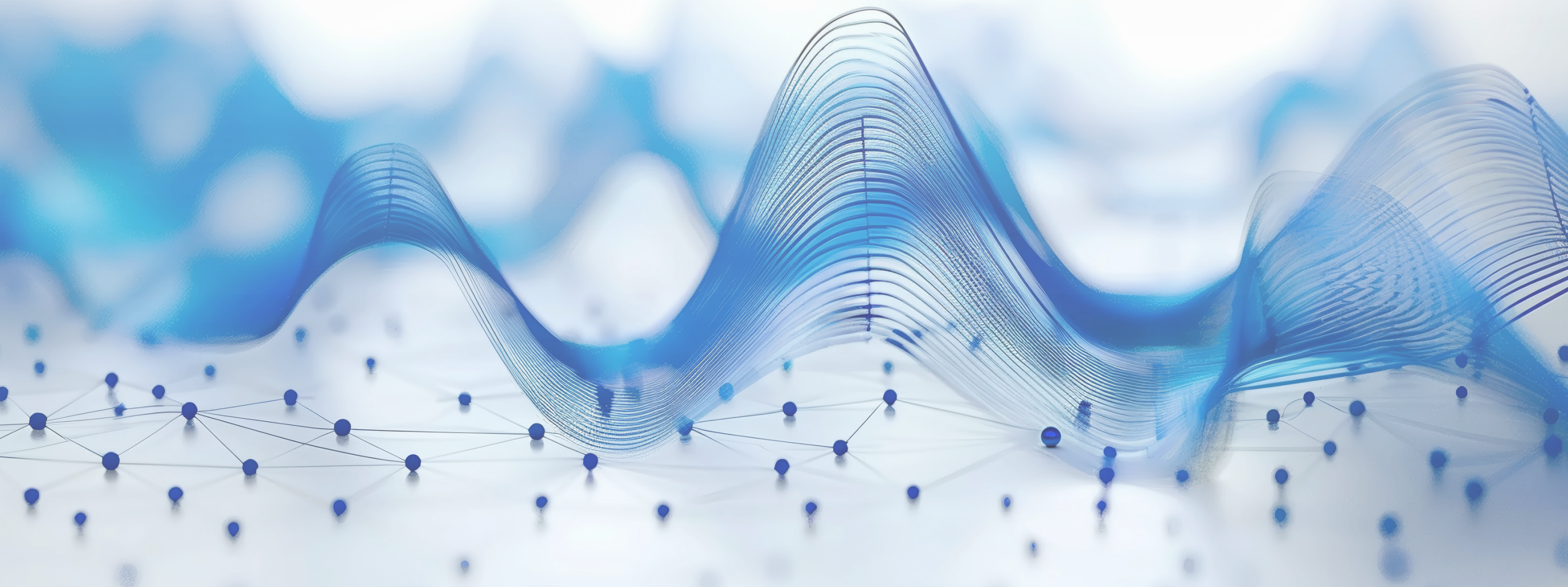


Setting up for success: **Best practices for onboarding**



Onboarding for success

Onboarding a generative AI tax research tool isn't just about activating accounts—it's about fostering firmwide fluency in a transformative capability.

Successful firms treat AI onboarding as a strategic initiative, not a one-off training event. By aligning teams on AI's role, creating tailored rollout strategies, and defining clear metrics for success, firms can accelerate adoption and maximize return on investment.

What you will learn:

- How to onboard an AI tax research tool like Blue J for long-term success.

Mike French

Managing Partner • JLK Rosenberger

"This year we made a firm-wide commitment to elevate our capabilities in AI, recognizing its growing relevance across the profession. Tax is a major part of our business and a natural entry point for generative AI. Through that lens, adopting Blue J allowed us to see firsthand how the right tool can deliver real value—speeding up research, increasing confidence, and freeing up time for higher-impact work."

Lay the foundation for AI success with onboarding

Educate and align the firm on the role of AI

Start by aligning the firm on what generative AI is, how it works, and why it matters in the evolving landscape of tax practice. Position the rollout as part of a broader modernization effort—not just another tool—highlighting how platforms like Blue J enhance, rather than replace, human expertise.

Address common concerns early, especially around job displacement, to build trust and create a shared understanding of AI's role in augmenting professional judgment and enabling more strategic, client-focused work.

Design the rollout to fit your firm's culture and size

There's no one-size-fits-all rollout strategy. Two proven approaches stand out:

Option 1: Start with a pilot group

Launch with a small, cross-functional team—often composed of innovation-minded partners, managers, and reviewers. This group can:

- Validate early outputs and spot potential hallucinations
- Identify high-impact use cases
- Draft initial guidance and use-case templates
- Serve as internal champions for firm-wide adoption

Option 2: Broad access from day one

Some firms opt for immediate, full-firm access—particularly when junior staff are already using tools like Google for research. In these cases, pairing access with structured training, use-case examples, and prompting resources can drive bottom-up momentum and surface early wins organically.

Turn adoption into advantage: Driving ROI and momentum

Define and track success metrics early

Establish clear goals for what success looks like. Common metrics include:

- Number of tax research questions asked
- Hours saved on tax research
- Number of memos or client communications automatically drafted
- Reduction in client response time
- Overall user adoption and engagement

Platforms like Blue J offer regular and on-demand usage reporting that optimize firm adoption initiatives and maximize the value for the investment. These insights allow leaders to validate ROI, optimize training, and fine-tune rollout strategies in real time.

Prompt effectively: How to collaborate with Generative AI

Generative AI is dynamic, not deterministic—ask the same question multiple ways, and you may get different (yet valid) answers. That’s a feature, not a flaw. Getting value from these tools means learning to prompt with clarity and intent. Prompting isn’t just using the tool—it’s collaborating with it. The better the input, the better the output.

For guidance on writing effective prompts, refer to the [Prompting Best Practices guide](#) brought to you by CPA.com and Blue J. It offers practical tips, real-world tax examples, and techniques to help you get the most accurate and relevant results from your generative AI research tool.

Demonstrate early wins through internal champions

One of the most effective ways to drive sustained adoption is through peer-led momentum. Identify and support early users—whether partners, managers, or junior staff—who are willing to share their results, demonstrate time saved, and help others learn how to use the tool effectively. These internal champions can shift perception across the firm far more quickly than top-down mandates.

Blue J recommends launching a Champions Program during onboarding to elevate these advocates and equip them with resources to spread success. When people see colleagues getting real value—faster research, smarter outputs, more time for client work—they’re more likely to engage themselves. That’s how adoption builds organically and becomes self-sustaining.

Pulling it together: Onboarding checklist

Checklist

Here are the key steps to set your firm up for success when implementing a generative AI tax research tool. This checklist is designed to guide your team through setup, enablement, and early adoption.

Pro tip: Treat onboarding as more than training—it’s your opportunity to build firmwide AI fluency and momentum. When users feel confident and supported, adoption follows naturally.

Week 1–2: Foundations & setup	Week 2–3: Build enablement infrastructure	Week 3–5: Internal training & early use	Week 4–8: Feedback, tracking & optimization	Week 8+: Long-term learning & strategic integration
<ul style="list-style-type: none"> <input type="checkbox"/> Finalize license activation and user access provisioning <input type="checkbox"/> Conduct kickoff meeting with the vendor <input type="checkbox"/> Define internal points of contact/program lead <input type="checkbox"/> Establish shared internal workspace for enablement content (e.g., SharePoint, Teams, OneNote, Notion) 	<ul style="list-style-type: none"> <input type="checkbox"/> Upload best practices, prompt guidance, and any other training materials to internal workspace <input type="checkbox"/> Update AI policy to reflect new AI tool usage (e.g., handling sensitive data) 	<ul style="list-style-type: none"> <input type="checkbox"/> Host live training sessions for staff (tiered if needed) <input type="checkbox"/> Assign key use cases for pilot users to try (e.g., 3–5 real-world tax questions or drafting tasks) <input type="checkbox"/> Identify and onboard 2–3 internal champions across levels and service lines <input type="checkbox"/> Encourage champions to run “how I used it” walkthroughs in team meetings <input type="checkbox"/> Share firmwide communications highlighting what the tool is and what it’s not 	<ul style="list-style-type: none"> <input type="checkbox"/> Assess tool usage (via vendor reports or internal survey) <input type="checkbox"/> Collect feedback from champions and early users <input type="checkbox"/> Identify top-performing prompts and add to shared training resource or prompt library <input type="checkbox"/> Host a check-in to share wins, blockers, and real examples <input type="checkbox"/> Adjust training content based on usage and team feedback 	<ul style="list-style-type: none"> <input type="checkbox"/> Analyze anonymized question logs and usage insights to identify staff knowledge gaps and training opportunities <input type="checkbox"/> Identify high-impact use cases to standardize across teams or service lines <input type="checkbox"/> Track long-term engagement to inform future AI investments and broader innovation initiatives

Turn early wins into sustainable change

The true value of AI tax research tools like Blue J isn't unlocked through access alone—it's achieved through intentional onboarding that aligns people, processes, and technology.

With the right foundation, AI adoption and engagement becomes self-sustaining—driven by results, reinforced by peers, and aligned with the firm's broader goals. When an AI tax research tool is integrated thoughtfully, it doesn't just accelerate research; it elevates how the entire firm operates, freeing up time for strategic work and strengthening client relationships.

The firms that treat onboarding as a launchpad, not a finish line, will lead in an AI-enabled future.

Ready to transform your tax research with GenAI?

Explore the CPA.com and Blue J Partner Program today—visit [CPA.com/TaxAI](https://cpa.com/TaxAI).

About CPA.com:

CPA.com brings innovative solutions to the accounting profession, either in partnership with leading providers or directly through its own development. The company has established itself as a thought leader on emerging technologies and as the trusted business advisor to practitioners in the United States, with a growing global focus. The company's core mission is to drive the transformation of practice areas, advance the technology ecosystem for the profession, and lead technology research and innovation efforts for practitioners. A subsidiary of the American Institute of CPAs, the company is also part of the Association of International Certified Professional Accountants, the world's most influential organization representing the profession.

About Blue J:

Founded in 2015, Blue J is the leading generative AI solution for tax research. Trusted by firms of all sizes, Blue J delivers fast, verifiable answers to complex tax questions, empowering professionals to provide exceptional client service. With its conversational interface and curated library of authoritative sources, Blue J is transforming how tax experts work.