ILLUSTRATIVE SAMPLE REPORT

AI OPPORTUNITY ASSESSMENT

Independent Accounting Firm

A sample of the report you receive after your assessment.

MODELED ON

A composite 6–10 person firm handling tax prep, monthly bookkeeping, and light advisory work.

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EXECUTIVE SUMMARY

A firm this size loses a large share of its capacity to work that isn't accounting at all – chasing documents, keying data, answering "where's my return?" AI can absorb much of that load and hand your team back hours for the advisory work clients pay a premium for, while judgment, review, and sign-off stay entirely with your people.

Where AI can help

Client document intake & chasing

HIGH PRIORITY

Your team spends hours each week requesting, tracking, and re-requesting client documents. An automated intake system sends reminders, tracks what's outstanding per client, and files documents as they arrive – no more manual nudging or hunting for a missing 1099.

Estimated 4–7 hours/week reclaimed

Transaction categorization & data entry

HIGH PRIORITY

AI proposes account codes for bank and card transactions and flags only the exceptions for review – instead of hand-coding every line. You keep control of the edge cases; the routine 80% moves fast.

Estimated 3–5 hours/week reclaimed

Client status updates & routine email

MEDIUM PRIORITY

The steady stream of status questions gets drafted automatically from where each job stands, ready for a quick human glance before sending.

Estimated 2–4 hours/week reclaimed

Meeting notes & follow-ups

MEDIUM PRIORITY

Client meetings get summarized into clean notes and a follow-up action list automatically, so nothing slips and no one retypes notes afterward.

Estimated 1–2 hours/week reclaimed

Proposal & engagement-letter drafts

MEDIUM PRIORITY

Generate a solid first draft of proposals and engagement letters from a few inputs, so a new engagement starts in minutes rather than from a blank page.

Estimated 1–2 hours per engagement

Estimated impact

Roughly 10–18 hours a week of admin time across the team — much of a part-time role, given back.

Redirected toward billable advisory work, or toward breathing room during busy season. The biggest wins here are usually document intake and categorization; those two alone often justify the whole effort.

What should stay human

NOT ON THE AUTOMATION LIST — BY DESIGN

- Tax positions, planning, and advisory judgment
- Final review and professional sign-off on every return and filing
- Client relationships and the sensitive money conversations
- Anything carrying professional responsibility or liability

A 90-day roadmap

Days 1–30	Stand up automated document intake and reminders for one service line (start with tax). Measure the hours actually saved so the rest is grounded in real numbers.
Days 31–60	Add transaction-categorization assist and status-update drafting. Tune the exception rules to your team's preferences.
Days 61–90	Roll out across remaining service lines, add meeting-notes automation, and review what's working before busy season.

Curious what this looks like for your business? **Book your assessment · elevationops.co**