

IMPLEMENTING AI

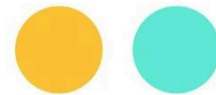
Module 6: Innovation and Expansion



0207-100-8788



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Implementing AI for Accountants Workbook

Welcome to the **Implementing AI for Accountants Workbook**. This workbook is designed to help you explore, test, and adopt AI tools in a way that enhances efficiency, strengthens client relationships, and positions your firm for long-term growth.

By completing the tasks and exercises in this workbook, you'll build a clear, step-by-step plan to identify where AI can make a difference, design a small pilot, and scale your use of AI responsibly.

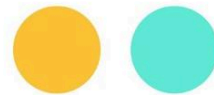
Instructions

- **Reflect on Your Current Processes:** Start by mapping out the workflows that take the most time or feel the most frustrating. What's repetitive, manual, or prone to errors? Where do clients experience delays or gaps?
- **Spot AI Opportunities:** Look for tasks where AI could reduce effort, improve accuracy, or free up capacity for more valuable work. Examples include drafting emails, automating reconciliations, summarising reports, or answering client FAQs.
- **Define Your First AI Pilot:** Choose one area to focus on as a low-risk test project. Be specific about what the AI will do, how you'll measure success, and what outcomes you want to achieve.
- **Check Readiness and Feasibility:** Review the data, tools, and skills you already have in place. Do you need to clean up data, provide team training, or set clear review steps to make AI use safe and effective?
- **Set SMART Objectives:** Write measurable goals for your pilot project, such as *"Reduce time spent on month-end reconciliations by 20% in the next quarter"* or *"Cut client email response times by 30% within 60 days."*
- **Build Your Pilot Workflow and Guardrails:** Outline exactly how AI will fit into your chosen process. Be clear about what the AI will and won't do, and add simple governance rules (e.g., all outputs reviewed by a human before going to clients).
- **Launch and Monitor Results:** Test your pilot. Track key outcomes such as time saved, error rates, and client response. Collect feedback from your team on ease of use, and refine as needed.
- **Refine and Scale:** Use what you've learned to improve your pilot and consider rolling out AI to other areas. Build AI into your firm's longer-term roadmap so it becomes a reliable, responsible part of how you deliver client service.

By the end of this workbook you'll have a practical roadmap for adopting AI in your firm — from identifying opportunities and designing a pilot, to setting safeguards and scaling your approach. With this plan, you can embrace AI confidently, improve efficiency, and deliver more value to your clients without losing the human touch.

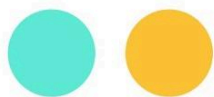
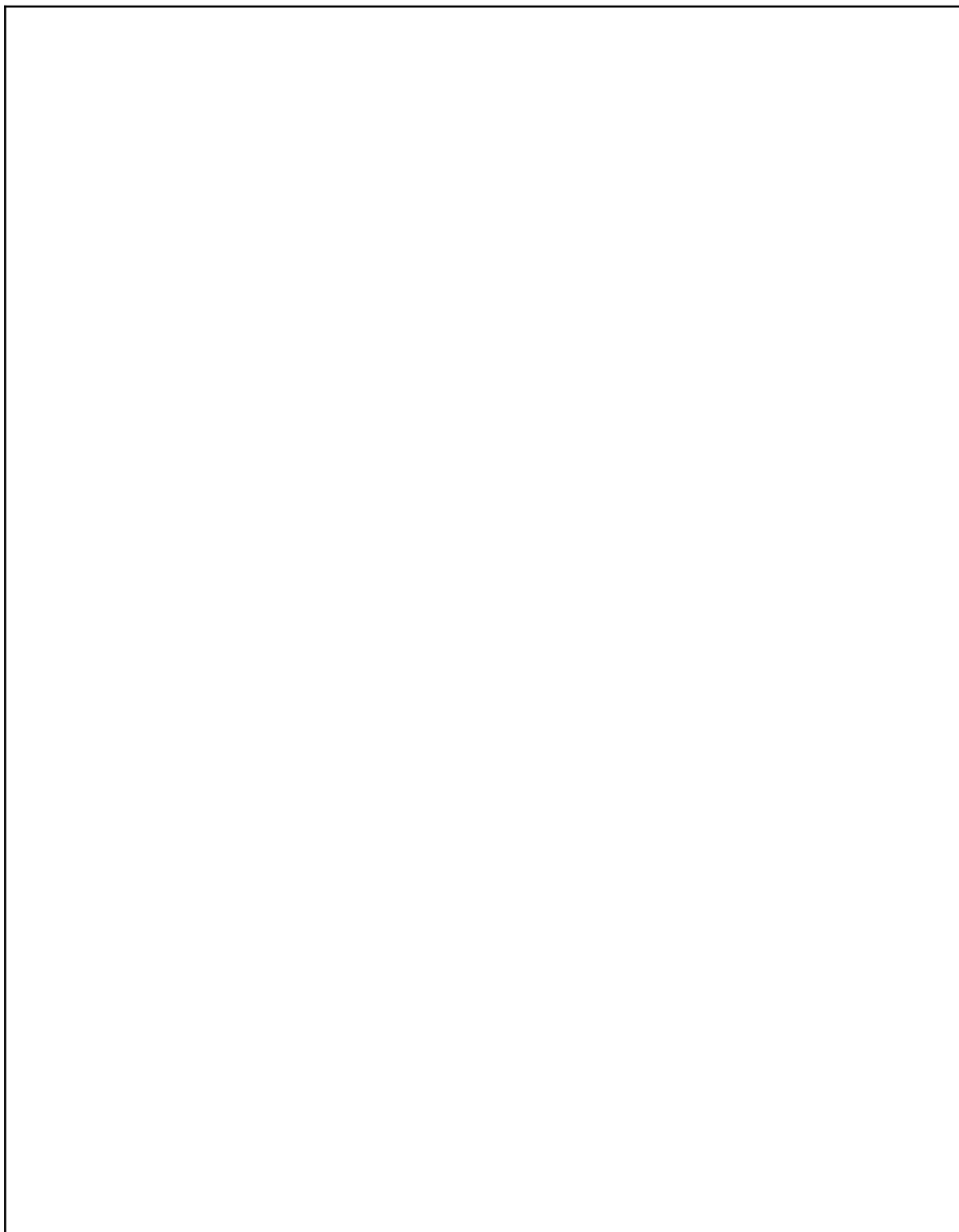
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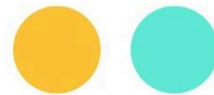




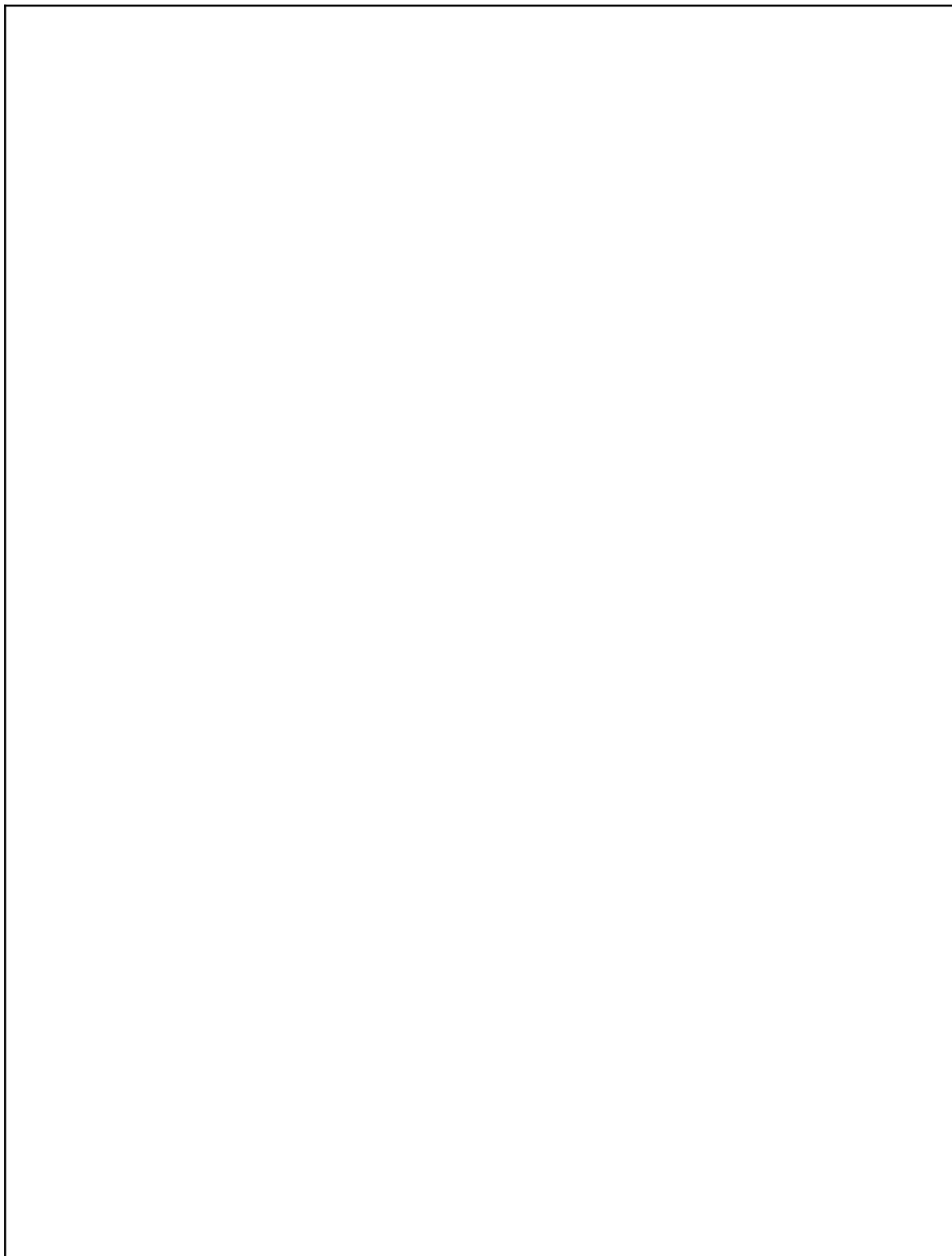
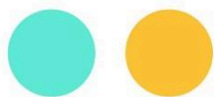
Section 1: Identifying Opportunities for AI

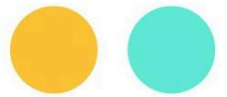
Think about the daily tasks that slow you down. Write down the areas of your work that feel repetitive, time-consuming, or frustrating (e.g., reconciling transactions, drafting client updates, sorting emails).





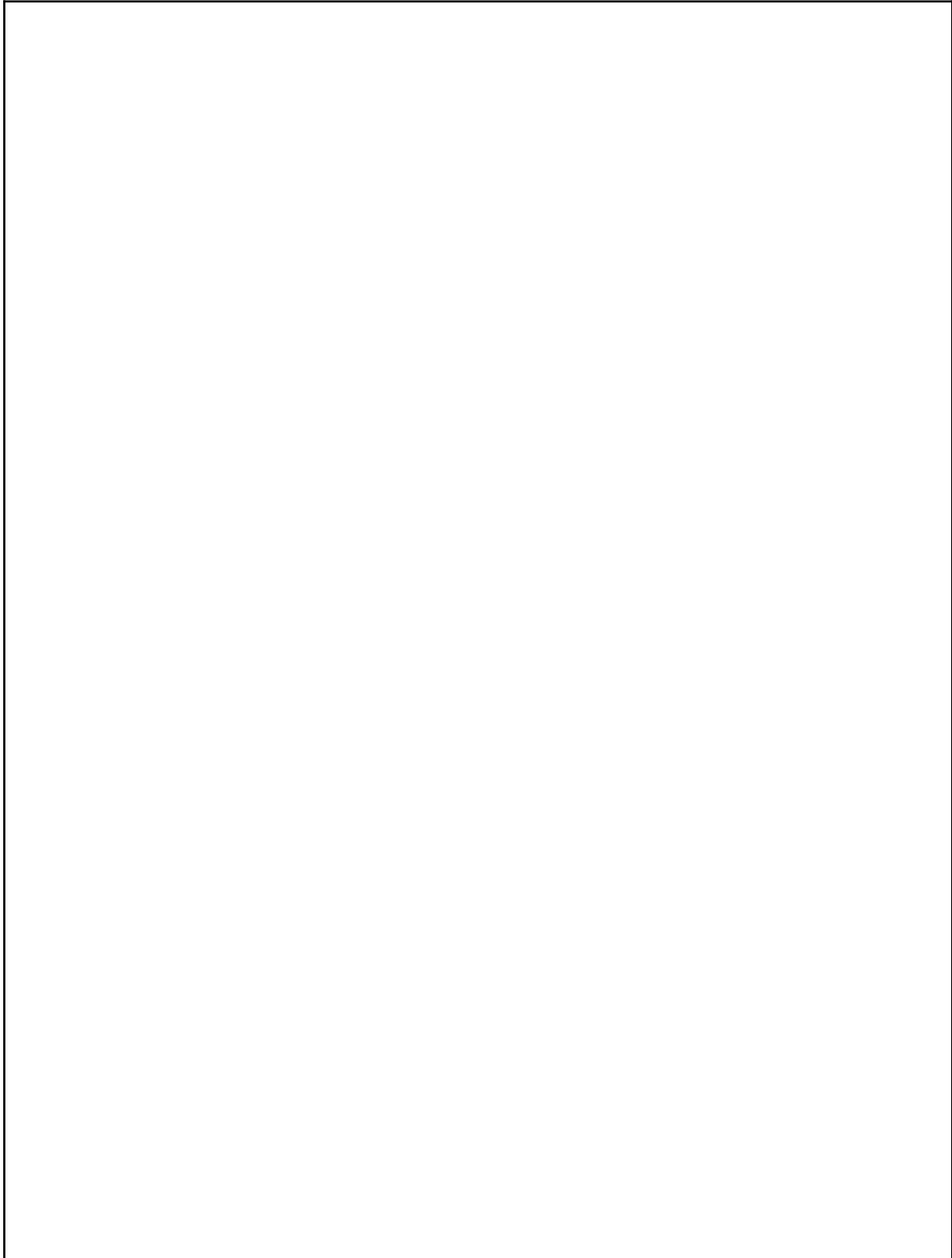
For each of the areas you listed above, write how AI might help. Be specific. Example: *"AI could draft first versions of client emails so we only need to review them, not write from scratch."*

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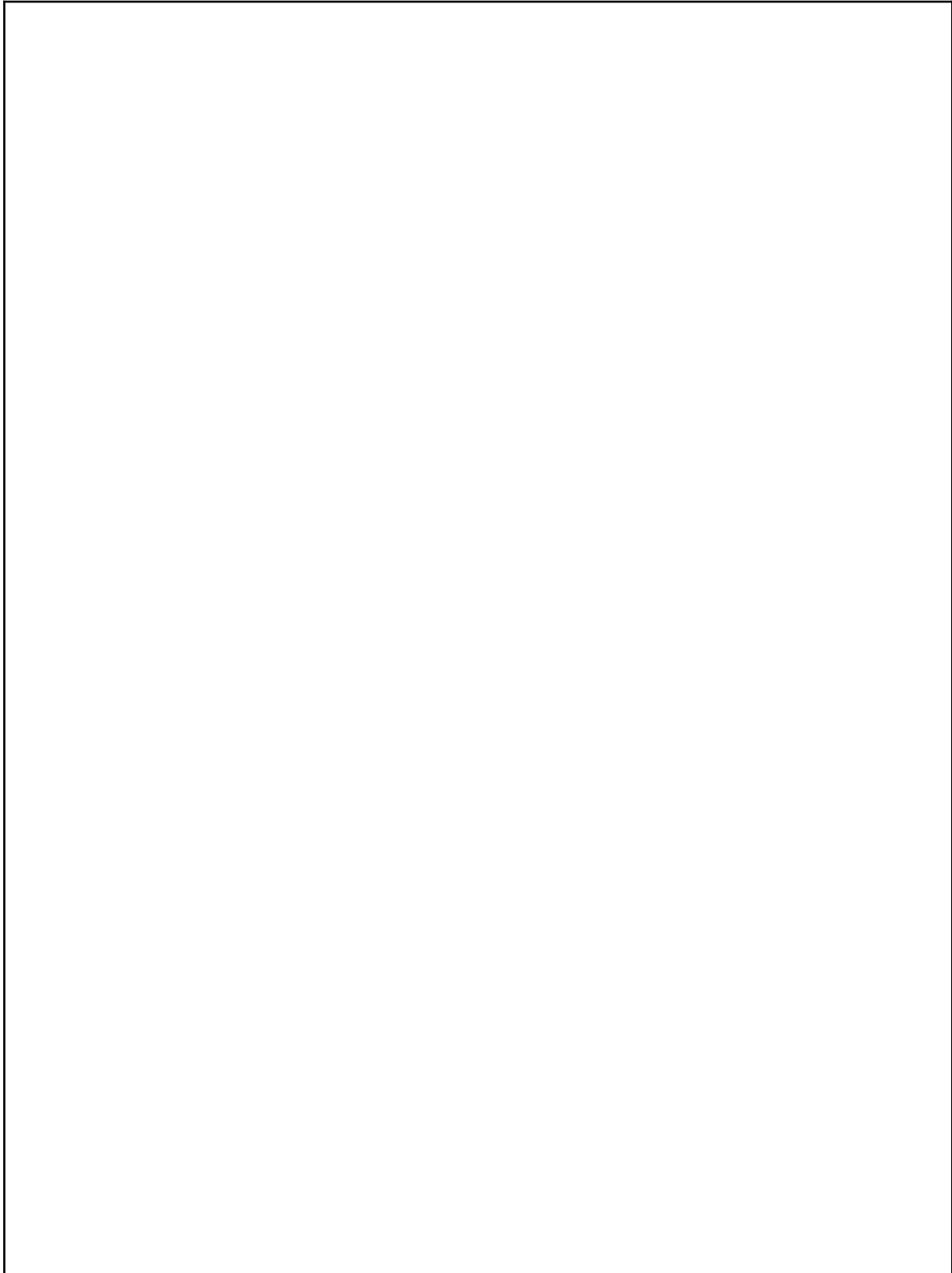
Section 2: Defining Goals and Success Measures

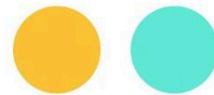
Take your chosen areas and write a specific AI goal using this format: *"We want to [improvement] by [X%/timeframe]."* Example: *"We want to reduce time spent on monthly reconciliations by 30% within 3 months."*





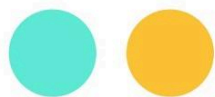
Describe how you will measure if each goal is met. Example: "Compare average turnaround time before and after." What's the minimum result that would make this project worthwhile?

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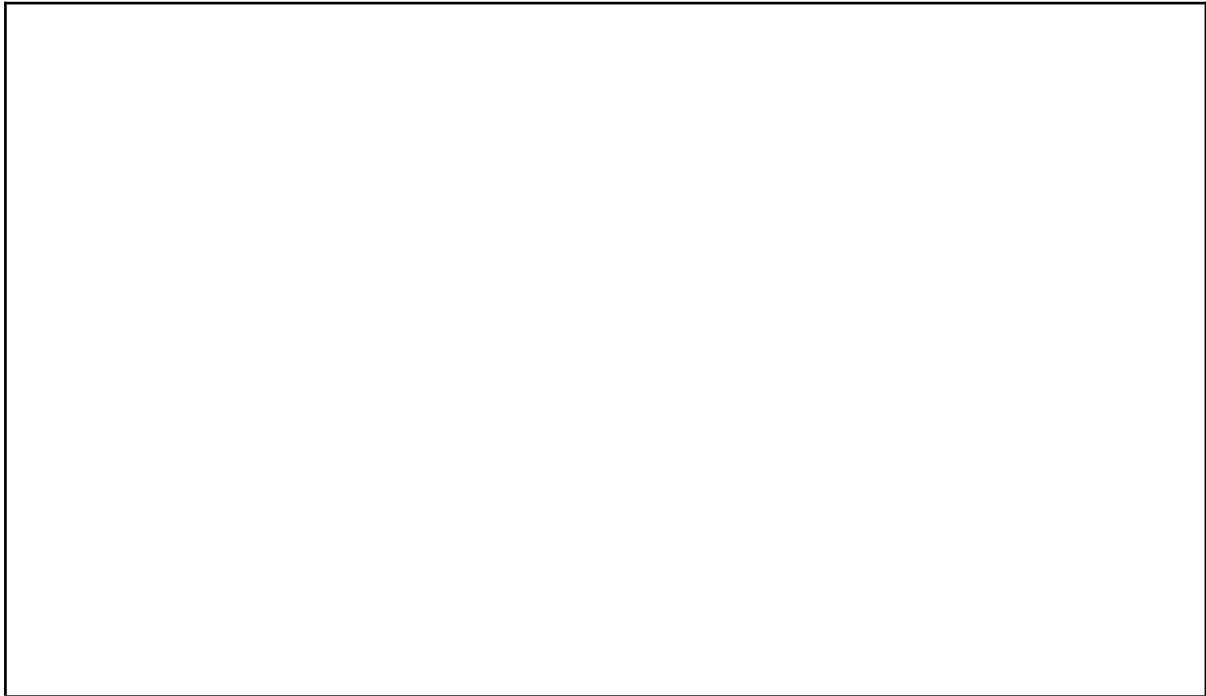
Section 3: Checking Your Data

What data would an AI tool need to work properly in your chosen area? List the key files, fields, or information sources.

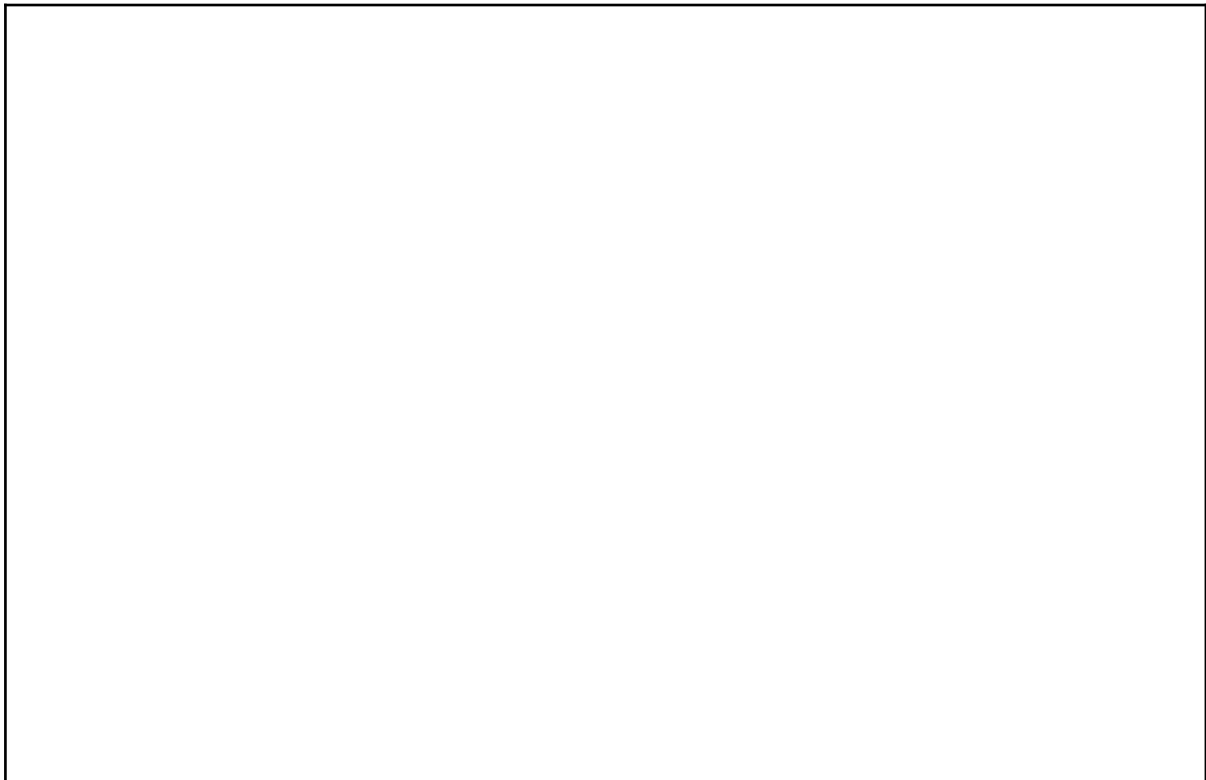




Where is this data stored (e.g., cloud software, spreadsheets, client emails)? Is it consistent across clients or teams, or does it vary?



Write 2-3 actions you could take to improve this dataset before testing AI (e.g., remove duplicates, standardise naming, ensure all clients use the same format).





Section 4: Designing Your AI Pilot

Define one pilot task: Describe the exact task you will test with AI. Keep it narrow and specific (e.g., "AI drafts client meeting summaries").

Outline the scope of this pilot. What will the AI do, and what will it *not* do? Example: "AI drafts, but humans always review before sending."

List 3 clear criteria that will define success for this pilot. Example: "Saves at least 1 hour per week," "Output is accurate 90% of the time," "Clients notice no drop in quality."



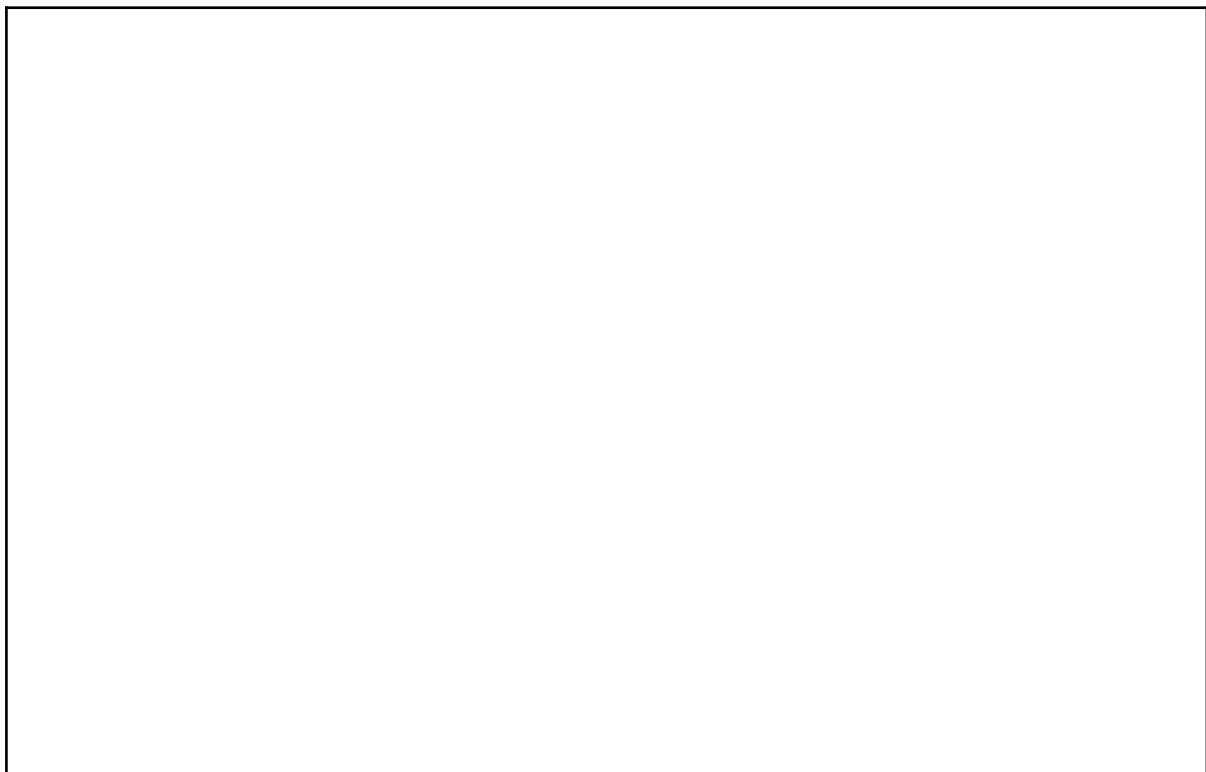


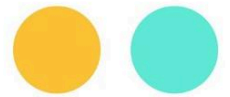
Section 5: Governance and Ethics

List at least 3 rules your firm will follow when using AI. Example: *"No sensitive client data in free tools," "Humans always review AI outputs," "Keep an audit log of AI use."*

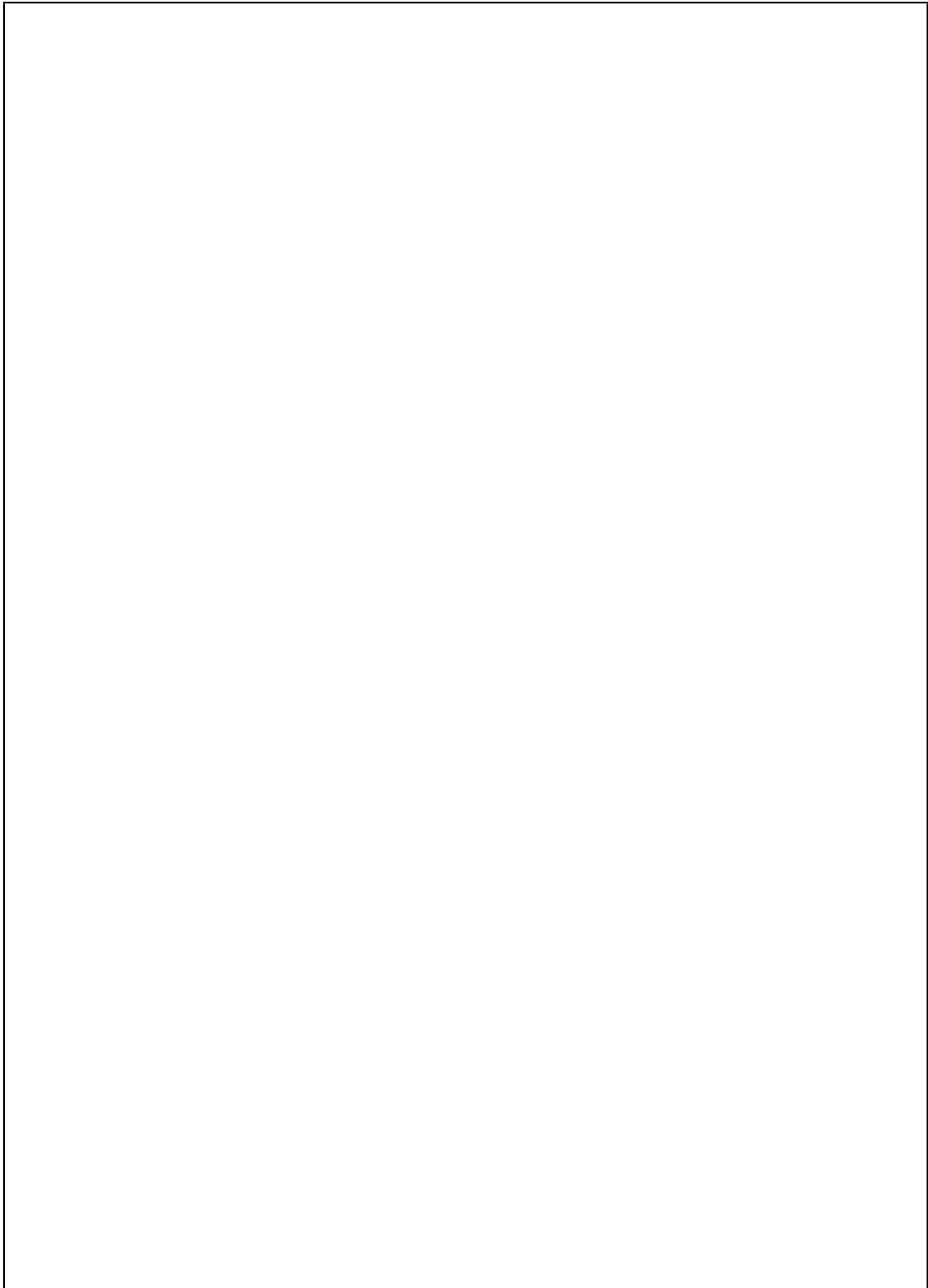


Write a short client-facing statement explaining how you'll use AI responsibly while ensuring quality and human oversight.





Identify all potential risks (e.g., inaccurate output, bias, security issue). Brainstorm how you'll prevent it or respond if it happens.

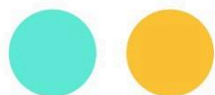
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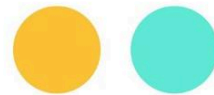


Section 6: Team Readiness

What skills will your team need to work well with AI? Think about prompt writing, reviewing AI outputs, or interpreting results.

Plan a simple training idea to get your team more confident with AI. Example: *“Run a 30-min session where we test AI prompts for tax Q&As and compare answers.”*



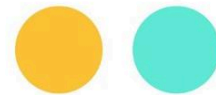


Section 7: AI Roadmap

Identify the Next Process: If your pilot works, what's the next process you'd test with AI?

Envision 12 Months Ahead: Over the next year, what tasks would you like to have handled by or helped by AI? Be ambitious but realistic.





Congratulations on Completing Your AI Implementation Workbook!

You've taken important steps to move your firm from curiosity to action — identifying AI opportunities, designing a pilot project, and building safeguards that ensure AI adds value without compromising quality.

Here's What to Do Next:

- **Review What You've Designed:** Look back at the processes, goals, and pilot plan you've created. Which AI use case has the clearest potential to save time, improve accuracy, or enhance client experience? Start there.
- **Set a Clear Pilot Goal:** Choose one pilot to launch. Define exactly what success looks like (e.g., "save 5 hours per month on reconciliations," or "cut client email response times by 30% within 60 days") and set a simple, trackable timeline.
- **Build a Repeatable Workflow:** Outline how AI will be used step by step. Clarify what the AI does, what humans review, and how results will be monitored. Keep it lightweight, but ensure it's safe, consistent, and client-ready.
- **Communicate Internally and Externally:** Share with your team why you're testing AI and how it helps them focus on higher-value work. If relevant, prepare a short client message that explains how AI will support faster, more efficient service — always with human oversight.
- **Collect Feedback and Iterate:** Once your pilot is running, gather feedback from your team and track outcomes. What's working well? Where are adjustments needed? Use these insights to refine your process and make your AI use more effective.
- **Think Ahead:** After your first pilot is stable, plan where AI could help next. Could you expand to client communications, reporting, or marketing support? This step-by-step approach is how you scale AI confidently across your firm.

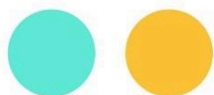
Final Thoughts:

Implementing AI isn't about replacing people — it's about empowering your team to deliver smarter, faster, and more strategic support. You now have the structure and roadmap to begin your AI journey.

Don't wait for the perfect system or the perfect time — launch, learn, and refine as you go. The firms that take action early will be the ones that thrive as AI reshapes the profession.

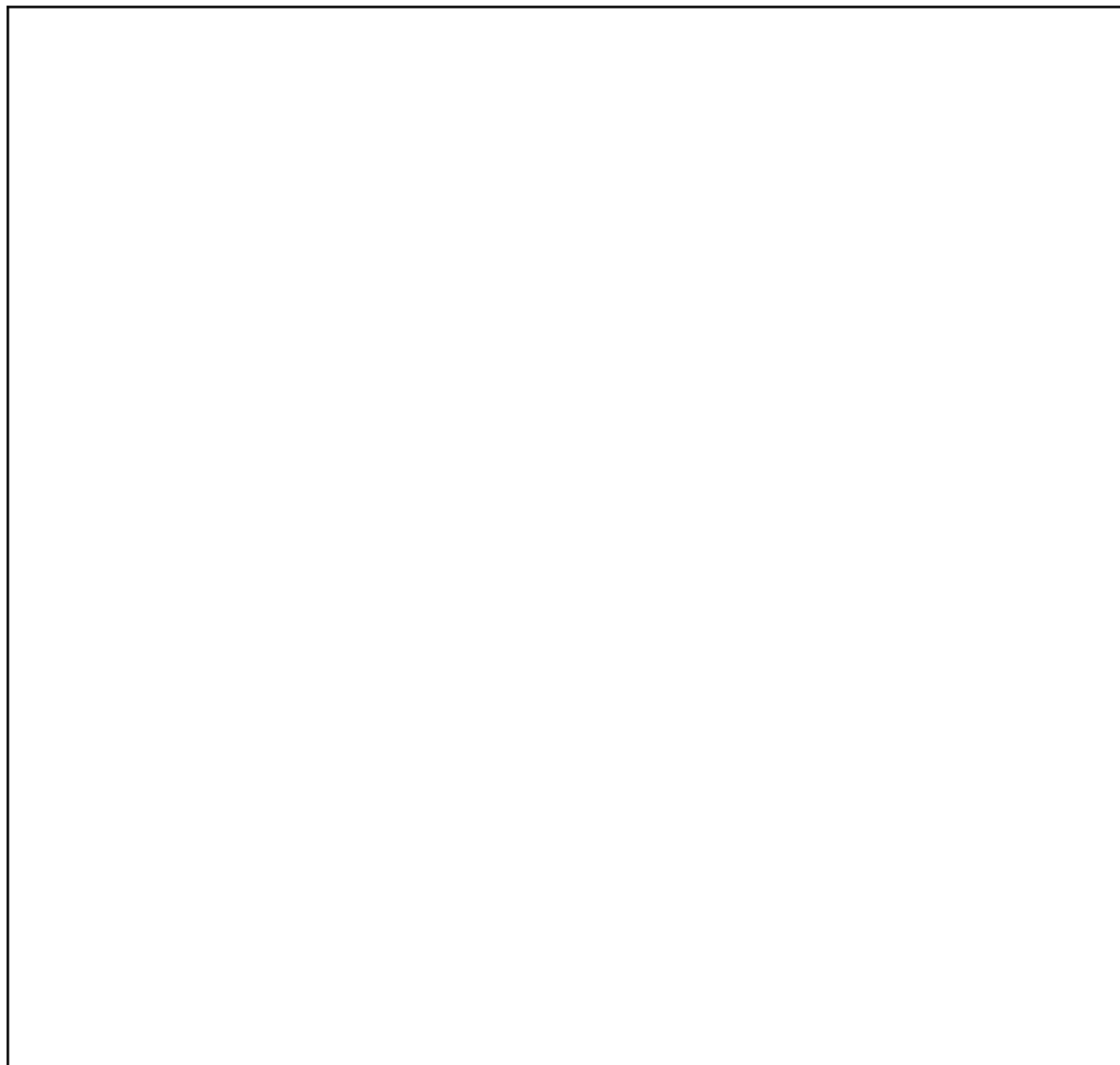
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Additional Notes





Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan.



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