



Kit&File

FREE SAMPLE · 6 PAGES

BOOKKEEPING AI FIT DIY · FREE SAMPLE

# Bookkeeping AI Fit DIY

Pick 2 to 3 AI uses that actually fit a bookkeeping firm, without breaking client trust.

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## IN THIS SAMPLE

1. Who this is for and how the diagnostic works
2. Worksheet A: Current-state audit
3. Worksheet B: Opportunity scoring
4. Checklist: Week 1 and Week 2 of the pilot

**\$47**

FULL KIT · Guide, workbook, prompts, pilot log

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*Less content. More use.*

# Is this kit for your firm?

This is a self-paced diagnostic and pilot kit. AI drafts; you decide. Nothing here replaces a bookkeeper's or CPA's professional judgment.

## **FIT** 1. Who this is for

### **You're a fit if:**

- You run (or lead) a bookkeeping or small accounting practice
- You want AI to cut repetitive drafting and status work, not to "automate the books" unsupervised
- You care about client trust, engagement letters, and review before anything leaves the firm
- You can give 30 days to a focused pilot (not a permanent side project)

### **You're not a fit if:**

- You need enterprise finance or shared-services AI architecture
- You mainly want a giant prompt dump with no decision framework

## **WORKFLOW** 2. How the diagnostic works

1. **Current state.** Where does time go? Where do errors or rework show up? What's already "good enough"?
2. **Opportunity score.** For each of five workflows, score hours saved, risk if AI is wrong, and ease of adding a human review gate.
3. **Commit.** Pick only 2 to 3 workflows. Run a 30-day pilot with review gates. Measure hours saved and errors caught before client send.

### **RULE OF THUMB**

If you can't name the human who reviews the AI output, don't use AI on that step yet.

# A. Current-state audit

Fill this in during Week 1. Be specific: firm names and hours beat vague scores.

Firm: \_\_\_\_\_ Completed by: \_\_\_\_\_  
 Date: \_\_\_\_\_ Pilot start date: \_\_\_\_\_

## WORKSHEET

### A2. Where time goes (last 30 days, estimate)

| Activity                           | Hours / month (you) | Hours / month (staff) | Pain (1 to 5) |
|------------------------------------|---------------------|-----------------------|---------------|
| Client onboarding / intake         |                     |                       |               |
| Bank/CC categorization and review  |                     |                       |               |
| Month-end close and status         |                     |                       |               |
| Client email / Q&A                 |                     |                       |               |
| Writing/updating SOPs and training |                     |                       |               |
| Other (name it):                   |                     |                       |               |

## CHECKLIST

### A3. Trust and review today

- ☐ We have a named reviewer for client-facing email
- ☐ We have a named reviewer before books are marked "closed" or ready
- ☐ New staff get a written close or categorization standard
- ☐ We already use AI informally (ChatGPT, Copilot, etc.). Where? \_\_\_\_\_
- ☐ We have told clients anything about AI use (Y/N): \_\_\_\_

**Biggest fear if AI is wrong:**

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## B. Opportunity scoring

Score each workflow 1 to 5. Higher means a better pilot candidate, but only if a review gate is realistic.

## WORKSHEET

### Five workflows

| Workflow                               | Hours saved (1 to 5) | Risk if wrong (1 to 5, lower is better) | Ease of review gate (1 to 5) | Fit = Hours + Ease minus Risk |
|----------------------------------------|----------------------|-----------------------------------------|------------------------------|-------------------------------|
| 1. Client onboarding / intake notes    |                      |                                         |                              |                               |
| 2. Transaction categorization assist   |                      |                                         |                              |                               |
| 3. Month-end close status / checklist  |                      |                                         |                              |                               |
| 4. Client Q&A reply drafts             |                      |                                         |                              |                               |
| 5. Internal SOP / staff training notes |                      |                                         |                              |                               |

Notes / overrides (e.g. "categorization is high hours but we lack a reviewer this quarter"):

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#### HARD RULES WE WILL NOT BREAK

- Never auto-file categorization without human review
- Never send client email unreviewed
- AI does not replace signed professional judgment

# D. Week plan: Weeks 1 and 2

The full kit covers all four weeks plus a 30-day pilot log. Here are the first two.

## CHECKLIST

### Week 1: Set up

- ☐ Finish this workbook
- ☐ Read Exclusions with anyone who will use prompts
- ☐ Baseline: estimate current hours for each picked workflow
- ☐ Pick tools (ChatGPT / Claude / Copilot / other): \_\_\_\_\_
- ☐ Create a shared place for drafts that are not client-ready

## CHECKLIST

### Week 2: Draft and review

- ☐ Run prompts on real recent work (not only toy examples)
- ☐ Log draft time vs review/edit time
- ☐ Tighten variables (client type, CoA naming, tone)
- ☐ Mid-pilot check: still the right 2 to 3?

## AI FIT FLASH

Stuck after week 2? AI Fit Flash (\$199) is a Chris-led prioritization pass. The full kit explains when it's worth it.

## GOOD TO KNOW

Weeks 3 and 4 (stabilize and decide), the prompt library, the 30-day pilot log and the quick reference are in the full kit.

# Ready to run the full 30-day pilot?

The full Bookkeeping AI Fit DIY kit gives you the complete diagnostic, every worksheet, and the prompts to run it.

## THE FULL KIT INCLUDES

- Guide: the full diagnostic, fit rules and pilot method
- Workbook: all worksheets, Sections A to D
- Prompt library for the five bookkeeping workflows
- 30-day pilot log and quick reference
- Exclusions sheet and license

**Get Bookkeeping AI Fit DIY · \$47**

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## ABOUT THIS SAMPLE

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Less content. More use.