Report for

Sample Accountancy Ltd

Sample report, prepared by Your MSP

Time AI could give back

10-18 hours a week

On the tasks you named, worth **£12,400-£22,300** of staff time a year.
Biggest drain: **documents**.

AI safety grade

Needs attention

A B C D **E**

3 areas to fix, 2 part way there.

How we worked it out

Accountancy, 25-49 people, about 30 at a desk

Task	Your team's time a week	AI could save	Hours back a week
Documents Harvard and BCG: tasks 25% faster	40-80 hours	15-25%	**9-15**
Credit control Our cautious figure	5-15 hours	15-25%	**1-3**
Total, hours a week			**10-18**

At £27 an hour: ONS median pay for your sector in 2026, plus 17.2% for employer costs. Everyday AI use is separate: about 1 hour a week for each person at a desk, as HMRC measured in its Copilot trial. It is one trial, so it is not added to your total.

AI safety by area

Where you are today, and what good looks like

AI tools in use Mostly free versions of ChatGPT, Claude or Gemini.	A short list of approved AI tools, set up for business use, that staff prefer to use.	A B C D **E**
Client information Client details go into AI tools now and then.	Client details only go into AI tools you control.	A B **C** D E
Staff rules There are no written rules on AI.	One page all staff can find, with a named owner: the approved AI tools, and what never goes into them.	A B C D **E**
Who can see what Copilot could possibly show people files they shouldn't see.	HR, finance and client folders open only to those who need them, checked before Copilot goes on.	A B C D **E**
Fake payment requests Your team would probably spot a fake call asking for money.	Every request to move money is confirmed on a second channel, every time, whoever it seems to come from.	A B **C** D E

What we found

Sample Accountancy Ltd is an accountancy practice of 25-49 people, with about 30 working at a desk on Microsoft 365 and Xero. Most of the time AI could give back sits in reading, checking and filing documents, with credit control behind it, 10-18 hours a week in all. Before any of that, client records need to stay inside tools you approve and control.

01 Client records are going into AI tools you don't control

You told us your team mostly uses free versions of ChatGPT, Claude or Gemini, that client information goes into AI tools now and then, and that there are no written rules on AI.

For a practice holding client books and records, each of these alone is small, but together client records can leave the business with nothing written to stop it. ICAEW says confidentiality duties apply in full when using AI, and public AI tools risk unauthorised disclosure.

ICAEW, November 2026, and PCRT guidance, January 2026. OpenAI Help Center and Google Gemini Apps Privacy Hub

First step

Choose the AI tools the business approves with Your MSP, then tell everyone that client details stay out of anything else. With 25-49 people it needs writing down, and one person needs to own it. Your MSP's Safe AI set-up covers this.

On its free plans, OpenAI says it may use what is typed into ChatGPT to train its models unless the user opts out, and Google asks people not to enter confidential information into Gemini that they would not want a reviewer to see.

02 Reading, checking and filing documents is where the time is

You told us reading, checking and filing documents takes your team 40-80 hours a week.

AI could give back 9-15 hours of that a week. Over a year that is 414-690 hours, about 55-92 working days.

Dell'Acqua and others, Harvard Business School and BCG, 2023

What to build

Bank statements, receipts and client records read and filed against the right client as they arrive. Staff only see the ones that don't match. It connects Microsoft 365 and your main business system. It waits on client information, AI tools in use and who can see what being put right first.

03 Payment requests need one firm rule

You told us your team would probably spot a fake voice or video call asking them to move money. You also named chasing invoices and payments as a time drain, so conversations about money are routine here.

In CEO fraud, criminals impersonate senior executives, sometimes using deepfake audio or video, to pressure staff into making urgent payments.

Stop! Think Fraud, UK government. DSIT Cyber Security Breaches Survey 2025/2026

First step

Agree one rule: any request to move money is confirmed by phone, on a number you already have. Make sure everyone who can make a payment knows it. Your MSP's Payment fraud briefing covers this.

46% of UK small businesses (10-49 staff) identified a cyber breach or attack in the last 12 months.

Also in your answers. Xero can already send payment reminders. Check who can see what before Copilot is switched on. With 30 people at a desk, everyday use is the bigger number. 3 of your 3 builds wait on a safety fix.

Next steps

01 This week

Choose the AI tools the business approves with Your MSP, then tell everyone that client details stay out of anything else.

02 This month

Safe AI set-up with Your MSP. Approved AI tools set up for the business, a one-page staff policy and a staff briefing.

What to build first

Chosen from the tasks you named, then the usual ones for your sector

01 Document reading and filing — 9-15 hours back a week

Bank statements, receipts and client records read and filed against the right client as they arrive. Staff only see the ones that don't match.

> A top-20 UK accountancy firm with about 1,300 staff cut document effort by up to 40% with AI agents built in Microsoft 365.
>
> Zenzero, July 2026. Supplier case study.

Measure first
Minutes per document

On Microsoft 365
Power Automate's AI Builder has a prebuilt model that reads invoices, and a custom one can be trained from as few as five documents.

Secure first
Client information, AI tools in use, Who can see what

02 Invoice chasing — 1-3 hours back a week

Overdue fees chased each morning in your firm's tone, with a note when a client goes quiet. You only step in on the awkward ones.

> AM2PM, a UK recruitment agency with 10 branches, cut its 90+ debtor days by 75% and saved 20 hours a week by automating credit control.
>
> Draycir. Supplier case study.

Measure first
Debtor days

On Xero
Xero has invoice reminders built in: up to five, before or after the due date, with a minimum amount if you want one.

Secure first
Client information, AI tools in use

03 New client and starter set-up — Suggested for your sector

New client forms, ID checks and engagement paperwork gathered and checked in one flow, with gaps flagged before work starts.

Measure first
Days from yes to ready to start

Each month
New forms and checks are added as your process changes.

Secure first
Client information, AI tools in use

Planned around the systems you named: Microsoft 365, Xero. Results shown beside a build were published by other organisations, as named. They are examples, not a forecast for your business.

What the rules say

ICAEW says confidentiality duties apply in full when using AI, and putting client data into public AI tools risks unauthorised disclosure.

ICAEW, November 2026, and PCRT guidance, January 2026

Talk it through

Ask about Safe AI set-up, or anything in this report.

Your MSP

Sources: Dell'Acqua and others, Harvard Business School and BCG, 2023; ICAEW, November 2026, and PCRT guidance, January 2026; NCSC, September 2026; DSIT UK Business Data Survey 2026; Microsoft, Copilot privacy documentation; Stop! Think Fraud, UK government; Microsoft Learn; Xero Central. Your answers are shared with Your MSP only.