Sample deliverable: AI workflow integration

AI workflow audit and recommendations

Alder Point Accounting. A 30-person accounting firm looking for safe ways to use AI on routine work.

Prepared by Shipwright Labs, October 2026

Sample deliverable prepared for a fictional client. Names, figures, and findings are illustrative.

Contents

1 Summary

2 Workflows reviewed

3 Top opportunities

4 What we won't automate, and why

5 Guardrails and data handling

6 Rollout and measurement

1 Summary

Alder Point Accounting has 30 people: 6 partners, 16 accountants, and 8 administrative staff. The partners asked where AI tools could take routine work off the team without putting client data or professional judgment at risk. We interviewed 11 staff members, reviewed 14 recurring workflows, and timed each one for two weeks.

14	5	About 110	About 2 months
Workflows reviewed	Recommended for AI	Staff hours a month addressable	Payback on setup and training time

Setup, the pilot, and training take about 220 hours of the firm's time: about 120 hours of staff time working with us to configure and test the five workflows, about 70 hours of extra pilot-team time, and 30 hours for a one-hour session for each of the 30 staff. Once all five workflows are live, they save about 110 hours a month, so that time is recovered in about 2 months. The tools run inside software the firm already licenses, plus one add-on: the AI features license for the firm's email and productivity suite.

2 Workflows reviewed

Workflows reviewed: 14 workflows, 348 staff hours a month

Workflow	Hours/month	AI fit	Risk	Recommendation
Client email triage and routing	48	High	Low	Recommend: save about 30 hours
Receipt and expense categorization	40	High	Low	Recommend: save about 28 hours
Document request follow-ups	34	High	Low	Recommend: save about 22 hours
Meeting notes and action items	22	High	Medium	Recommend: save about 16 hours
Engagement letter drafting	20	Medium	Medium	Recommend with partner review: save about 14 hours
Bank reconciliations	30	Medium	Medium	Use the accounting software's matching rules instead
Client onboarding forms	12	Medium	Medium	Revisit after the pilot
Advisory call preparation	14	Medium	High	Revisit once guardrails are in place
Scheduling client meetings	10	Low	Low	Use a scheduling link; no AI needed
Engagement profitability reports	8	Low	Low	Fix with a saved report template

Workflow	Hours/month	AI fit	Risk	Recommendation
Newsletter and website updates	6	Medium	Low	Too little volume to be worth it
Payroll processing	18	Low	High	Keep in the payroll system
Tax-position memos	26	Low	High	Not a fit: professional judgment
Final review and sign-off on returns	60	Low	High	Not a fit: professional responsibility

The five recommended workflows take 164 staff hours a month today. With AI doing the first pass and a person reviewing the result, they take about 54, which saves about 110.

3 Top opportunities

These three rank highest on hours saved and lowest on risk. Together they account for about 80 of the 110 hours.

1. Client email triage and routing

Item	Plan
Tool category	AI features in the firm's existing email and productivity suite, under the firm's business agreement
Setup	Sort incoming client email by client and request type, draft replies to routine requests, and route the rest to the right accountant's queue
Guardrails	Runs only inside the firm's own tenant; drafts never send on their own
Human review point	The assigned accountant reviews and sends every drafted reply
Hours saved	About 30 a month, from 48

2. Receipt and expense categorization

Item	Plan
Tool category	AI categorization built into the firm's bookkeeping software
Setup	Turn on suggested categories for bookkeeping clients, based on six months of each client's categorized history
Guardrails	Low-confidence suggestions go to a review queue; nothing posts to a closed period
Human review point	A bookkeeper approves each batch before it posts
Hours saved	About 28 a month, from 40

3. Document request follow-ups

Item	Plan
Tool category	Client portal reminders with AI-drafted, client-specific checklists
Setup	Build each client's missing-documents list from the engagement checklist and send reminders on a schedule through the portal
Guardrails	Uses only the firm's portal and approved message templates; reminders never include tax advice
Human review point	An accountant approves each client's first checklist of the season
Hours saved	About 22 a month, from 34

Meeting notes (about 16 hours) and engagement letter drafting (about 14 hours, with partner review of every letter) follow once the first three are running smoothly.

4 What we won't automate, and why

- **Professional judgments.** Tax positions, advisory recommendations, and anything a CPA signs. AI may help find sources, but a person reaches and documents the conclusion.
- **Final review and sign-off.** Responsibility for returns and financial statements stays with the partner who signs them.
- **Unapproved tools.** Nothing that would send client data to a tool the firm has not approved, including free chat tools on personal accounts.
- **Payroll.** It already runs in dedicated software with its own controls, and adding AI there adds risk without saving time.

5 Guardrails and data handling

Area	Rule
Approved tools	AI features in the firm's email and productivity suite, the bookkeeping software, and the client portal. Nothing else without partner approval.
Data classification	Three levels: public, internal, and client confidential. Client confidential data, including tax return information, goes only into approved tools, and each tool is added to the firm's written information security plan.
Retention	AI drafts and logs follow the firm's existing records retention policy. Each vendor agreement bars the vendor from using client data to train its shared AI models.
Review steps	A named person reviews every AI output before it reaches a client.
Access	The pilot team gets a short briefing before the pilot starts. Everyone else completes the one-hour training before they get access, and access is removed when someone leaves.

A one-page policy staff can follow

We hand over a one-page AI use policy and a prompt library for the five workflows, so staff know what is allowed without reading a manual.

6 Rollout and measurement

Phase	Weeks	What happens
Baseline	Weeks 1 to 2	Time each recommended workflow again to confirm the starting hours
Pilot	Weeks 3 to 6	Email triage and receipt categorization with one team of 10, after a short briefing
Training	Weeks 7 to 8	One-hour sessions for all 30 staff; policy and prompt library handed out
Expansion	Weeks 9 to 12	Email triage, receipt categorization, and document requests firm-wide, then meeting notes and engagement letters, with weekly check-ins
Measurement	Weeks 15 to 16	Time the workflows again for two weeks and report hours saved against the baseline

We measure with the same two-week timing used in the audit, before and after, workflow by workflow. The savings we report are hours we observed, not estimates. Partners get the results at week 16, with a recommendation on the two workflows marked "revisit".