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AI for accountants and bookkeepers: 10 prompts

For small practices and sole practitioners. Ten prompts for the work around the numbers: chasing records, explaining things plainly, and keeping clients on track.

Before you start

These prompts are for communication and organisation. They don't replace your professional judgement, and an AI chat tool is not a reliable source for tax rules, rates or deadlines.

- ✗ Don't paste client names, figures, bank details or tax references into a public AI tool
- ✗ Don't rely on AI for tax rates, thresholds, deadlines or the treatment of a transaction. Check the official guidance

- ✓ Describe the situation in general terms, and add the client's details yourself afterwards
- ✓ Follow your professional body's guidance and your firm's policy on AI tools

Getting what you need from clients

PROMPT 1

Chase records without sounding like a robot

The deadline is close and the shoebox hasn't arrived.

> Write three reminders asking a client for their records for **[type of return or accounts]**. I need: **[list]**. The date I need them by: **[date]**. One: friendly. Two: firmer, a week later. Three: clear about what happens if they're late, stated generally as **[consequence]**. Each under 90 words.

PROMPT 2

Make a "what to send us" checklist

New client, or the same questions every year.

Write a simple checklist for a **[type of client, e.g. sole trader / small limited company / landlord]** of the records to send their accountant for **[type of work]**. Plain English, grouped under headings, with a one-line reason for each item. I'll check it against the rules myself.

PROMPT 3

Write a welcome email for a new client

They've signed. Start as you mean to go on.

Write a welcome email to a new client of a small accountancy practice. Cover: what happens next, what I need from them and by when, how to send documents safely via **[method]**, how quickly we reply, and key dates as placeholders. Friendly, clear, under 180 words.

Explaining things plainly

PROMPT 4

Explain a concept without jargon

A client asks "what's the difference between profit and cash?"

Explain **[concept, e.g. the difference between profit and cash flow]** to a small business owner with no finance background. Use one everyday example and keep it under 120 words.

Tip: Use this for concepts, not for rules or rates.

PROMPT 5

Turn a technical paragraph into plain English

You've written something accurate that no client will understand.

Rewrite this for a client with no accounting background. Keep the meaning exactly the same, and tell me if any part can't be simplified without changing it: **[paste your own non-confidential text]**.

PROMPT 6

Write the covering note for a set of accounts

The accounts are done. The client wants to know what they mean.

Write a short covering note to go with a client's year-end accounts. The story this year, in general terms: **[e.g. sales up, margin down, cash tighter]**. Explain what it means, what to watch, and suggest a call. Use **[FIGURE]** placeholders where numbers go. Under 160 words.

Running the practice

PROMPT 7

Write an engagement or fee email

Scope has grown, or fees are going up.

Write an email to a client explaining that **[the scope has changed / our fee will change]** from **[old]** to **[new]** from **[date]** because **[reason]**. Clear, respectful, no over-apologising, under 120 words.

PROMPT 8

Build a month-end checklist

The process lives in one person's head.

Draft a month-end checklist for a bookkeeper serving a small **[type of business]**. Order the steps, add a one-line "why" to each, and mark the ones that most often cause errors. I'll adapt it to our software and check it.

PROMPT 9

Turn a client call into actions

Straight after the call.

Here are my notes from a client call, with names and figures removed: **[paste]**. List the actions for me, the actions for the client, the deadlines mentioned, and anything I should confirm in writing. Then draft the follow-up email with placeholders.

PROMPT 10

Write a helpful post for clients

A newsletter or LinkedIn post, to stay front of mind.

I want to write a short, helpful post for my small business clients about **[topic]**. The facts, which I've checked: **[your facts]**. Turn it into a friendly 150-word post with a clear takeaway and a suggestion to get in touch.

Tip: Write the facts yourself. Let AI help with the wording, not the rules.

Map your month-end, step by step

Tell doingit.today how a job really runs in your practice. We'll map it in plain steps, mark the ones AI could help with, and teach you each one.

Free to start. No tech background needed.

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