

# Automating Your Tasks With Copilot

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# The Problem

Accountants are drowning in administrative work. Email overload, manual reporting, chasing clients for documents, writing the **same engagement** letters repeatedly. You didn't train for years to spend your days copying and pasting into Word documents.



## Email Overload

Hundreds of client queries buried in your inbox, each demanding individual attention and responses.



## Time Scarcity

Billable hours consumed by non-billable tasks that add **no real** value to your clients.



## Repetitive Documents

The same letters, reports, and communications written from scratch again and again.



## Professional Burnout

Qualified accountants reduced to data entry clerks, **with no time** for strategic advisory work.

# The Solution: Three Layers

Microsoft's AI ecosystem offers a progressive approach to automation. Think of it as a ladder — each rung takes you further towards a fully automated accounting practice.



## Layer 1: Copilot

Your daily AI assistant built into the Microsoft 365 apps you already use. Saves time on routine tasks without changing your workflow.



## Layer 2: Copilot Studio

Custom AI assistants trained on your firm's specific documents, processes, and expertise. Your knowledge, available 24/7.



## Layer 3: Power Automate

The full automation engine connecting everything together. Eliminates entire manual processes from your firm.

# Layer 1: Copilot

Microsoft Copilot is built directly into Outlook, Word, Excel, and Teams. There's no new software to learn, no separate login, no disruption to your existing workflow. It simply makes the tools you use every day dramatically more powerful.

Key capabilities include instant email summaries, automatic meeting transcripts with action items, report drafting from bullet points, and the ability to query Excel data in plain English. No formulas, no complex functions — just ask questions and get answers.

30

Minutes Saved

Average time saved per user, per day

## Copilot Works Where You Work



Outlook



Word



Excel



Teams

# Copilot in Action

Here's how forward-thinking accounting firms are using Copilot to reclaim hours every single day:



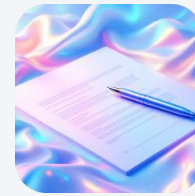
## Client Chase Emails

Copilot drafts personalised follow-up emails for missing documents or overdue information. It reviews your previous correspondence and maintains your firm's tone whilst being appropriately assertive.



## Meeting Follow-Ups

Automatically generates meeting summaries with action items, deadlines, and owner assignments. Transforms an hour-long client meeting into a structured document within seconds.



## Engagement Letter Drafting

Create first drafts of engagement letters, proposal documents, and service agreements by providing bullet points. Copilot handles the formatting, structure, and professional language.



## Year-End Narrative Reports

Transform raw financial data into compelling narrative reports for clients. Copilot analyses the numbers and drafts clear, client-friendly explanations of performance and trends.

# Layer 2: Copilot Studio

This is where it gets transformative. Copilot Studio allows you to build custom AI assistants trained on your firm's own documents, templates, processes, and institutional knowledge. It's like cloning your best partner and making them available 24/7 to both clients and staff.

## Client FAQ Bot

Answers common client questions instantly using your firm's knowledge base. Available round the clock, even when your team isn't.

## Onboarding Assistant

Guides new clients through your onboarding process, requests documents, explains requirements, and ensures nothing falls through the cracks.

## Internal Knowledge Bot

Helps staff find precedents, templates, technical guidance, and best practices without trawling through shared drives or asking colleagues.

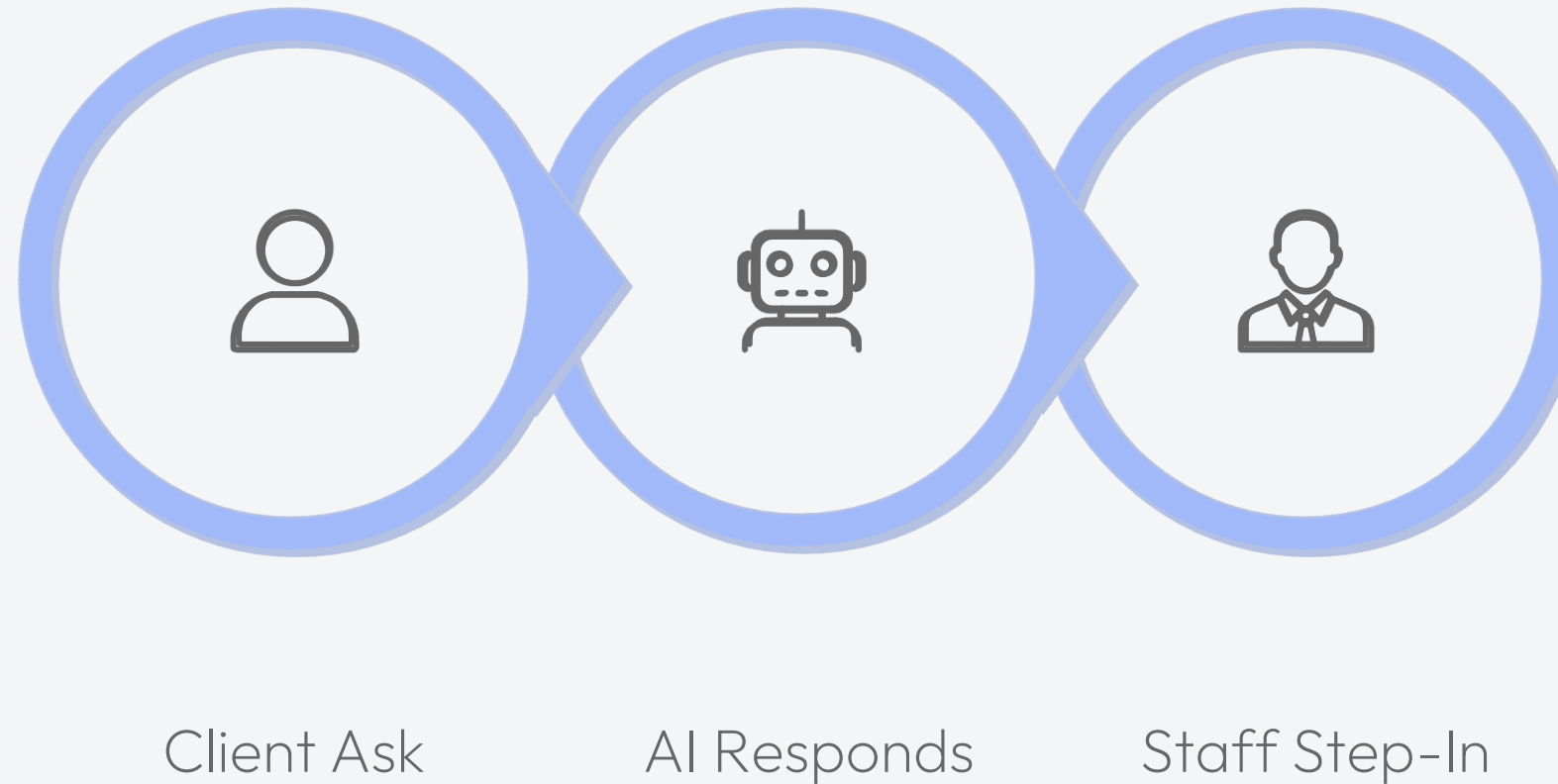
## Deadline Reminder Bot

Proactively reminds clients of upcoming deadlines, required actions, and submission dates. Reduces last-minute panic and late filings.

"Like cloning your best partner and making them available 24/7."

# Copilot Studio in Action

Here's the workflow transformation in practice:



This intelligent triage system means your qualified staff only handle complex queries that genuinely require human expertise. Routine questions, document requests, and standard guidance are handled instantly by your custom AI assistant.

The result? Clients get faster responses, staff focus on high-value work, and your firm can handle significantly more enquiries without expanding headcount. Some firms

## Layer 3: Power Automate

### The Engine Room

If Copilot is the brain that thinks and Copilot Studio is the assistant that responds, Power Automate is the hands that execute.

It connects everything together – Microsoft 365, your practice management software, accounting platforms like Xero, QuickBooks, and Sage, plus hundreds of other business applications.



Power Automate doesn't just save time on individual tasks. It removes entire manual processes from your firm. Document chasing, approval workflows, data entry between systems, status updates, compliance checks – all handled automatically, 24/7, with perfect consistency.

This is where firms achieve the 20-30% capacity increase without hiring. Not through working harder, but through eliminating the work that should never have been manual in the first place.

# Power Automate in Action

Real automation workflows deployed by accounting firms today:



## Client Document Chase

Automatically detects missing documents, sends reminder emails at set intervals, escalates to staff if no response, and updates your practice management system.



## New Client Onboarding

Triggers welcome email, creates folder structure, sends engagement letter, requests ID documents, sets up recurring tasks, and notifies the engagement team.



## Invoice Approval Flow

Routes invoices to appropriate approvers based on amount and type, sends reminders, logs all decisions, and updates your accounting system upon approval.



## Meeting to Action Tracker

Extracts action items from Teams meetings, creates tasks in Planner or To-Do, assigns owners, sets deadlines, and sends follow-up reminders.

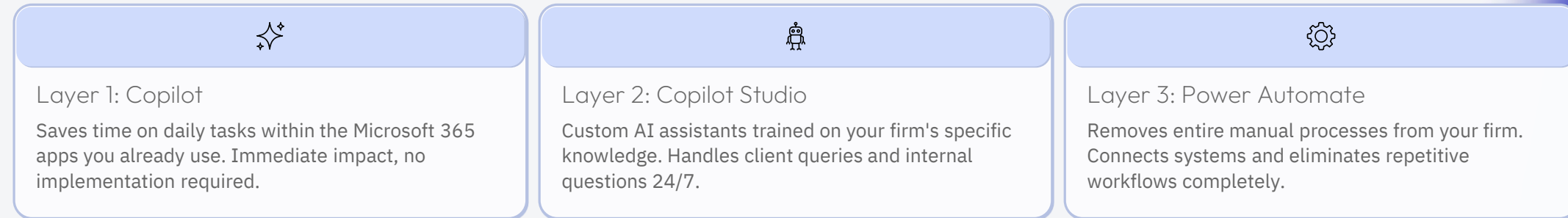


## Compliance Deadline Automation

Monitors regulatory deadlines, triggers client notifications at 90, 60, and 30 days, creates staff tasks, and generates required documentation templates.

## The Full Picture

The three layers work together to create a completely transformed accounting practice:



The firms that dominate the next five years won't be the biggest – they'll be the smartest. They'll be the ones who recognised that professional services have fundamentally changed, and who acted decisively to adopt these tools whilst their competitors hesitated.

80%

Tasks Automatable

Of rule-based accounting tasks can be automated with existing technology

20-30%

Capacity Increase

More clients served without adding headcount through intelligent automation

Copilot Studio assistants can handle hundreds of client queries simultaneously – something impossible with human-only teams. This isn't about replacing accountants. It's about elevating them from administrative processors to strategic advisors.



### Next Step: Free Microsoft AI Readiness Review

Hello AI will review your current Microsoft setup, identify where these three tools fit, and give you a practical roadmap. No obligation. Book yours today.

Visit [helloai.co.uk](https://helloai.co.uk) or contact us directly to arrange your complimentary assessment.

*Practical AI. Real Results.*

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