

Welcome to our monthly newsletter for Tech-Talk members. We hope you find this useful, but as always, please contact Billie Mcloughlin for further help or if there are any topics you wish to discuss.

## How AI can support your firm ahead of the Spring Statement

With the Spring Statement due at the end of March, UK accountants face the dual challenge of staying on top of new fiscal changes while continuing to deliver their regular personalised client service.

Fortunately, Artificial Intelligence (AI) is proving to be an invaluable ally. In this article we will cover some of the best ways this technology can enhance your firm's overall efficiency to help you during an increasingly busy time.

### **Simplifying Complex Legislation and Summarising Key Changes**

The Spring Statement, like any major fiscal update, brings with it a wealth of information that is not only complex but time-sensitive too. AI-powered tools can help break down dense legislative texts into straightforward, digestible insights. These systems are capable of scanning lengthy documents and providing clear, bullet-point summaries that highlight the most significant changes.

Whether you need to explain how new tax thresholds or relief measures affect your clients or simply want a quick reference for your own use, using Co-Pilot in your browser or inputting documents such as the OOTLAR into Chat-GPT, you can achieve this at the touch of a button.

### **Automated Client Communications, Dynamic FAQs, and Data Storage**

One of the most significant benefits of AI is its ability to automate and personalise client communications. Imagine having a system that can draft tailored emails, newsletters, or even detailed reports based on the latest Spring Statement updates.

By feeding relevant data into an AI tool, you can quickly generate client-facing content that explains the fiscal changes in terms that resonate with each specific business sector / client size / what other segmentation you decide on.

It is also worth mentioning AI-driven chatbots which are growing in popularity. FAQs can be integrated into your website or client portal where chatbots can draw information and provide instant responses to common

queries about the Spring Statement, easing the burden on your team by handling routine questions and meaning your clients can get a response around the clock.

Some firms even record the announcement on their AI notetaker apps and then they have a searchable transcript to revisit should they need to be reminded of any part of Rachel Reeves speech.

### **Predictive Analysis, Scenario Modelling, and Seamless Tool Integration**

Beyond communication, AI can add value through predictive analysis and scenario modelling. Due to the sensitive nature of client data, many accountants prefer to use tools they already know are secure, but many of these now also have AI built in.

By analysing historical data alongside the new fiscal measures, AI tools can forecast potential impacts on various sectors based on announcements made e.g. changes in tax rates. This enables you to advise clients on likely trends and make informed decisions about financial planning within different scenarios being modelled.

In conclusion, embracing AI isn't just about keeping pace with technological advances - it's about transforming the way your firm handles busy periods and fiscal events such as the Spring Statement. From simplifying legislative complexity and automating client communications, to harnessing predictive analytics for forward-thinking advice, AI offers a comprehensive toolkit designed to place your practice ahead of your competitors and deliver the highest value service to your clients.

# Jenesys Launch 'JackPod'

You may have heard of Jenesys and their AI bookkeeper 'Jack'. Well now they have launched JackPod, an end-to-end bookkeeping solution that combines AI technology with expert human oversight, designed for accounting practices with growth aspirations.

At its core, JackPod pairs "Jack" (Jenesys' proprietary Ark 2 AI model explicitly built for bookkeeping) with senior bookkeepers who review all outputs, ensuring accuracy while significantly improving efficiency. Unlike traditional offshore outsourcing models that churn through transactions that you may feel do not get to know your client's chart of accounts well enough, JackPod restores consistent accuracy and control of the training process.

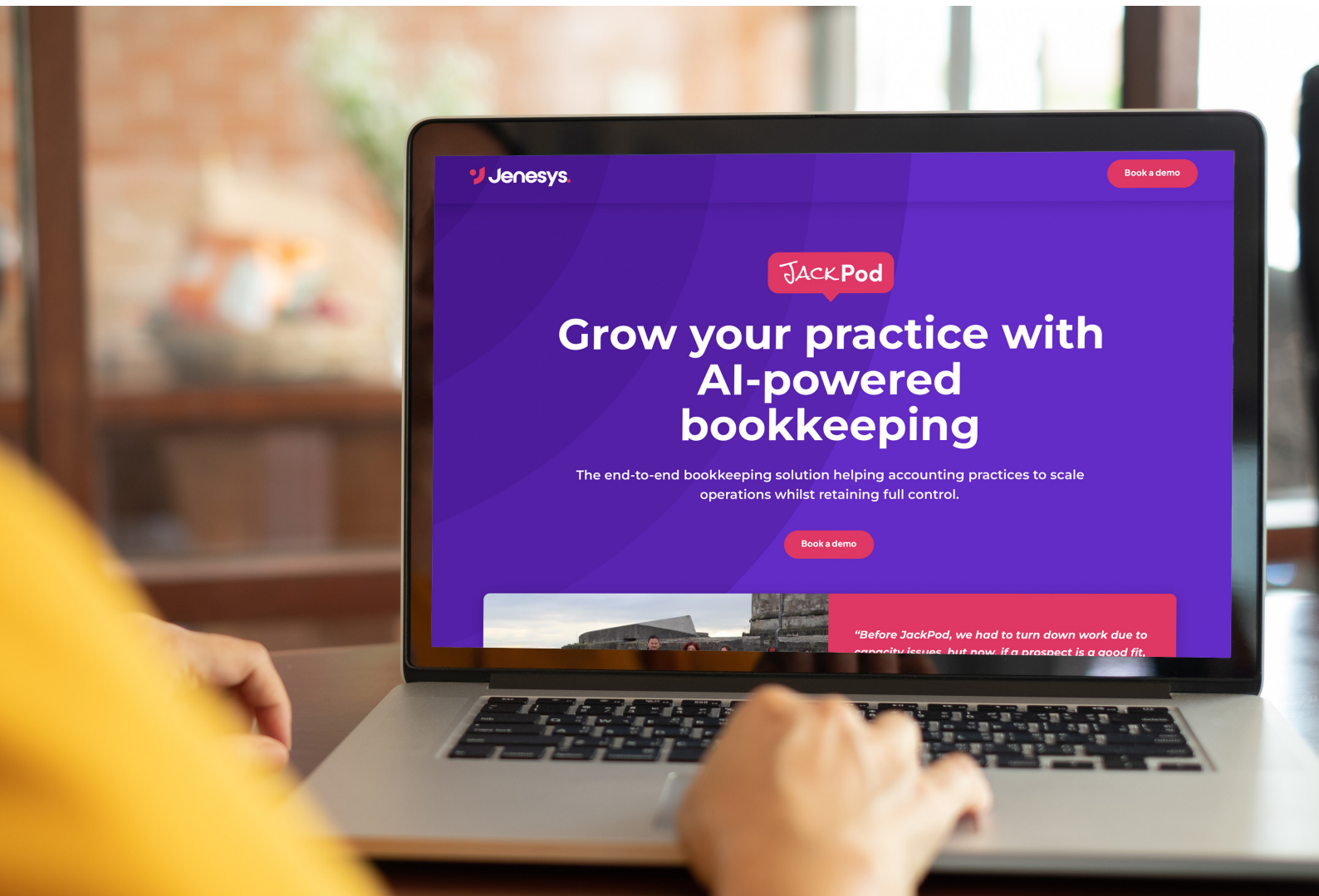
Key benefits for accounting practices:

- **Scalability without staffing concerns:** Eliminate the recruitment cycle when bookkeepers leave, with transaction volume-based pricing that removes the risk of building operational capacity ahead of growth.
- **Enhanced operational efficiency:** JackPod delivers completed books within a 7-day SLA from month-end, handling transactions, bank reconciliations, and month-end closing procedures.
- **Simplified document management:** Clients can submit invoices and receipts via email or WhatsApp, eliminating time spent chasing documentation. JackPod chases clients for missing documents over your materiality limit.

- **Secure operations:** The system operates through a fully closed architecture with SOC 2 compliance and GDPR adherence, ensuring your clients' data remains protected.

Implementation takes approximately one week, with dedicated account management and regular service reviews, enabling your practice to focus on higher-value advisory services while maintaining complete control over quality.

This solution transforms bookkeeping from an operational headache into a strategic advantage, allowing practices to increase margins and grow revenue without the traditional hiring constraints.



# Software Spotlight: Bots For That

I firmly believe that the future of accounting is AI powered and as we develop further, using agents and bots to support that (we recently hosted a webinar for our Tech-Talk members on what to consider and how to implement bots – [watch it on demand here](#)).

I'm excited to share how Bots For That is spearheading this transformation. In my experience, they empower both Top 100 and SME practices to unlock efficiency, profitability, and scalability through custom-built, AI-powered digital workers designed specifically for bookkeepers and accountants.

Their innovative solutions take care of the repetitive, manual tasks – like bank reconciliations, payroll processing, reporting, and compliance – so that you can concentrate on high-value activities such as advisory, strategic planning, and strengthening client relationships.

Think of it as a way of eliminating repetitive manual tasks that require little to no thought (once initial training has been completed) and handing this over to a digital employee. A bot.

In research performed by Bots For That, they discovered that 80% of firms plan to invest more in this space over the next year and 81% report increased profit, reduced costs, and improved talent retention.

In an industry where speed, accuracy, and scalability are paramount, firms that don't adapt risk falling behind and the gap between you and your competitors will only get larger. Whether you're looking to streamline internal processes, enhance margins, or secure a competitive edge, Bots For That offers solutions that are finely tuned to the needs of modern practices.

They have two options available, one for off the shelf bots which are popular with other firms or a more tailored approach to cater for your specific needs, which comes with a higher investment.

To me, automation isn't about replacing accountants – it's about empowering them. Bots For That's approach to eliminating, simplifying, standardising, automating, and measuring processes is a testament to how smart technology can deliver real, transformative business impact. Please do reach out to the team if you want to know more, or visit them at the upcoming Digital Accountancy Show.

