MIKE AUTOMATIONS · FREE GUIDE

25 AI Automations for Accountants & Small Firms (2026)

Practical, plain-English ideas you can switch on with the tools you already use: Xero, QuickBooks, Gmail, Outlook, Google Drive and OneDrive. No new software and no jargon.

We build it. It runs. Then you pay.

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How to use this guide

Most small firms don't need more software. They need the repetitive part done for them: the chasing, the reminders, the copying from one place to another. That's what this guide is about.

There are 25 ideas in five groups. You don't need all of them. Read through, tick the three that would save your team the most time, and start with one.

What the labels mean

- NO-CODE You can set this up yourself with tools like Zapier, Make or Power Automate, or with the built-in features of your software.
- AI A language model reads, sorts or drafts text. **A person always checks before anything important goes out.**
- QUICK WIN Usually set up in an afternoon, and you'll feel the difference in the first week.

Three rules that save a lot of pain

1. **Automate a process you already do the same way every time.** If it's different for every client, write down the steps first.
2. **Keep a person in the loop for anything that leaves the firm**, at least for the first few weeks. Approve the wording once, then let it run.
3. **Keep client data inside your own accounts.** Choose tools that run on your Microsoft 365 or Google Workspace, check where any AI tool stores data, and record it in your GDPR notes.

The 25 at a glance

Group	Automations
1. Getting new clients in	Instant enquiry reply · intake form to client record · engagement letter draft · ID and AML requests · onboarding sequence
2. Collecting documents	Personal checklist · reminders that stop themselves · auto-filing · AI document check · morning "still outstanding" list
3. Talking to clients	AI reply drafts · deadline reminders · meeting reminders · status updates · review requests
4. Getting paid	Invoice on completion · overdue reminders · missing-receipt requests · quote follow-ups · annual fee review
5. Running the firm	Inbox triage · email to task · meeting notes to actions · deadline calendar · weekly workload report

1. Getting new clients in

Answer quickly, collect everything once, and never retype a name.

01 Instant reply to every enquiry NO-CODE QUICK WIN

When someone fills in your website form or emails your enquiries address, they get a friendly reply within a minute. It says what happens next and includes a link to book a call. The enquiry is also logged in one list, so nothing sits unanswered in a shared inbox.

Tools: your website form plus Zapier, Make or Power Automate, and Gmail/Outlook. **Watch out:** keep it short and human. It's an acknowledgement, not a sales pitch.

02 Intake form that creates the client record NO-CODE

One online form collects the name, company, UTR or company number, services needed and key dates. On submit, it creates the client in your practice software or spreadsheet, makes a client folder, and tells the right person.

Tools: Microsoft Forms, Google Forms, Typeform or Jotform, plus Karbon, TaxDome, Xero Practice Manager or a Sheet. **Watch out:** ask only for what you need now. You can collect the rest later.

03 Engagement letter drafted from the intake NO-CODE

The services ticked on the intake form fill in your engagement letter template automatically, with the right scope, fees and dates. It waits for a partner to approve, then goes out for e-signature.

Tools: Word or Google Docs templates, plus DocuSign, Adobe Sign or the e-sign feature in your practice software. **Watch out:** keep one master template per service. Don't edit letters by hand.

04 ID and AML checks requested and tracked NO-CODE

Each new client automatically gets the request for ID and proof of address, or a link to your ID-check provider. Reminders go out until the check is complete, and the client's status shows "AML done" before any work starts.

Tools: your AML provider (many have email or Zapier connections) plus your client list. **Watch out:** the decision stays with a person. Automation only does the chasing and the record-keeping.

05 Onboarding sequence NO-CODE QUICK WIN

A short series of emails over the first two weeks: welcome and who's who, how to send documents, how to give you software access, and the key dates for the year. New clients stop asking the same five questions.

Tools: Gmail/Outlook with scheduling, or the sequences feature in your practice software. **Watch out:** send from a real person's address, not "noreply".

2. Collecting documents

The biggest time sink in most firms, and the easiest to fix.

06 A personal checklist for every client NO-CODE

Each client gets their own list of what's needed this period: P60, bank statements, rental figures, invoices. The list is built from their services and last year's file, so nobody has to send "the usual list" and hope.

Tools: a Sheet or your practice software's client requests, plus email. **Watch out:** the list should show what's still missing, not everything you've ever asked for.

07 Reminders that stop by themselves NO-CODE QUICK WIN

Friendly reminders go out every few days, more often as the deadline gets closer. The moment the document arrives, that client's reminders stop. No more "sorry, I sent that yesterday."

Tools: Zapier or Make with Gmail/Outlook and your checklist, or built-in reminders in Karbon or TaxDome. **Watch out:** write them in your own voice and approve the wording once. Tone matters more than frequency.

08 Uploads filed and renamed automatically NO-CODE

Whatever the client sends, whether an email attachment or an upload link, it lands in the right client folder with a sensible name like *2025-26 · Bank statements · Barclays.pdf*, and the item is ticked off the checklist.

Tools: OneDrive, SharePoint, Google Drive or Dropbox plus Zapier, Make or Power Automate. **Watch out:** agree on one folder structure first. Automation copies a mess just as quickly.

09 AI checks what came in AI

An AI step reads each upload and suggests what it is: "this is a P60 for 2024-25" or "this looks like last year's statement". Anything doubtful is flagged for a person. It catches wrong-year and wrong-document uploads before you sit down to do the work.

Tools: Dext or Hubdoc for receipts and invoices, or an AI step in Make or Zapier for general documents. **Watch out:** treat it as a suggestion, not a decision, and check the tool's data-processing terms.

10 A morning "still outstanding" list NO-CODE QUICK WIN

One short email at 8:30: which clients are still missing what, how many days are left before each deadline, and who hasn't opened their reminders at all. That last group are the ones to phone.

Tools: a scheduled automation that reads your checklist and sends a summary. **Watch out:** keep it to one screen. If it's longer, nobody reads it.

3. Talking to clients

Fewer "just checking in" emails in both directions.

11 AI drafts replies to common questions AI

For the questions you answer every week, like "what's my deadline?", "can I claim this?" or "where do I send my P60?", an AI drafts a reply from your own notes and templates. A person reads it, edits it if needed, and sends it.

Tools: Copilot in Outlook, Gemini in Gmail, or an AI step that saves drafts. **Watch out:** drafts only. Never let AI send tax advice on its own.

12 Deadline reminders per client NO-CODE

Each client gets a reminder ahead of their own key dates: Self Assessment, VAT quarters, MTD quarterly updates, payment on account, or US filing dates. It says exactly what they need to do. Clients stop missing dates, and you stop being their calendar.

Tools: your client list with deadline columns plus a scheduled automation. **Watch out:** check that the dates in your list are right. A wrong reminder is worse than none.

13 Meeting reminders and easy rescheduling NO-CODE QUICK WIN

Booked calls get a reminder the day before, with a one-click link to move them. Fewer no-shows and no back-and-forth emails.

Tools: Cal.com, Calendly or Microsoft Bookings. **Watch out:** set buffer times so your day doesn't fill with back-to-back calls.

14 "Where's my return?" status updates NO-CODE

When a job moves stage, for example records received, in progress, ready for review or filed, the client gets a short automatic update. Most status calls disappear.

Tools: job stages in Karbon, TaxDome, XPM or a Sheet, plus email. **Watch out:** only send updates for stages the client cares about.

15 Review requests after the job NO-CODE QUICK WIN

A few days after a return is filed, happy clients get a polite request with a direct link to your Google review page. A steady trickle of reviews does more for new enquiries than most advertising.

Tools: your job stages plus email. **Watch out:** ask everyone the same way. Don't filter or reward reviews, since the review platforms forbid both.

4. Getting paid

Money in, with less awkward chasing.

16 Invoice raised when the job is done NO-CODE

When a job moves to "filed" or "complete", the invoice is drafted in Xero or QuickBooks with the agreed fee, ready for a quick check and send. Nothing finished goes unbilled at the end of a busy month.

Tools: Xero or QuickBooks plus your job list. **Watch out:** keep fees in one place, so the invoice and the engagement letter always agree.

17 Polite overdue reminders NO-CODE QUICK WIN

A friendly note before the due date, another on the day, and a firmer one a week later, each with the invoice and a payment link. They stop the moment the invoice is paid.

Tools: built-in reminders in Xero or QuickBooks, or a tool like Chaser. **Watch out:** turn them off for clients you're already speaking to about payment.

18 Missing receipts requested from the bank feed NO-CODE AI

Bank transactions with no receipt or explanation are collected into one short list per client: "these 6 payments need a receipt or a note". It goes out with a single upload link, instead of an email per transaction.

Tools: Xero or QuickBooks bank feeds plus Dext, or an automation that reads unreconciled items. **Watch out:** set a minimum amount, so clients aren't asked about £3 coffees.

19 Quote and proposal follow-ups NO-CODE

Proposals that haven't been accepted get a short follow-up on day 3 and day 7, then stop. More "yes" answers, with no awkward manual chasing.

Tools: your proposal tool, such as GoProposal, Ignition or Practice Ignition, or email plus a Sheet. **Watch out:** two follow-ups are plenty.

20 Annual fee review, prepared for you NO-CODE AI

Once a year, a report lists each client's fee next to the time and work it actually took, with the outliers flagged. An AI step can draft the fee-change letters for you to review.

Tools: time or job data from your practice software plus a Sheet. **Watch out:** a person decides every price change.

5. Running the firm

Less admin about the admin.

21 Inbox triage AI

Incoming emails are labelled automatically: client documents, questions, HMRC or IRS letters, invoices, newsletters. The shared inbox becomes a set of short queues instead of one long scroll.

Tools: Outlook rules or Gmail filters, plus an AI labelling step for the unclear ones. **Watch out:** start with clear-cut rules, and add AI only for what rules can't sort.

22 Email to task in one click NO-CODE QUICK WIN

Flag or forward an email, and it becomes a task with the client, a due date and a link back to the email. Nothing lives only in someone's inbox.

Tools: Karbon, Asana, ClickUp, Microsoft Planner or Todoist. **Watch out:** pick one task list for the whole firm.

23 Meeting notes to action points AI

Client calls are summarised automatically, with decisions, action points and dates, and filed to the client record. The follow-up email is drafted for you to check and send.

Tools: Teams or Zoom summaries, Fireflies or Otter. **Watch out:** tell clients you're taking notes, and keep recordings in line with your privacy policy.

24 One deadline calendar for the whole firm NO-CODE

Every client deadline from your client list appears in a shared calendar, colour-coded by service, with a weekly "coming up" email. No more surprises from a deadline that only lived in one person's head.

Tools: a client list plus Outlook or Google Calendar. **Watch out:** the client list is the single source of truth, so the calendar only reads from it.

25 Weekly workload report NO-CODE

Every Monday: jobs in progress, jobs waiting on clients, jobs overdue, and who has too much on. Partners see the bottlenecks in two minutes, without a meeting.

Tools: your practice software's reports, or a Sheet plus a scheduled summary. **Watch out:** report on a few numbers you'll act on, not everything you can measure.

Worked example: the January chase, start to finish

How #6, #7, #8, #9 and #10 fit together. For illustration, with demo data.

Take a five-person practice with around 300 Self Assessment clients. Today, one person spends most of December and January emailing, phoning and filing. Here's the same season with the five automations running.

When	What happens automatically	What a person does
1 October	Every client gets a personal checklist (#6), built from last year's file, with one upload link.	Approves the email wording once.
October-December	A reminder every 10 days to anyone with items outstanding (#7). Each upload is filed and renamed (#8), and an AI step flags wrong-year documents (#9).	Checks the flagged uploads, which take a few minutes a day.
Every morning	The 8:30 email (#10): who's missing what, days left, and who hasn't opened anything.	Phones the "not opened" group, a short list, not 300 names.
From 2 January	Reminders every 3 days, with the deadline in the subject line.	Personal calls to the last stragglers.
Records complete	The client gets "we have everything, we're on it" (#14), and the job moves to "ready to prepare".	The actual accounting work.

What changes

- Nobody writes a chasing email by hand. The team only contacts clients when a conversation is actually needed.
- Partners see the state of the season in one email, instead of asking around.
- Clients get clear, consistent requests, so fewer of them send the wrong thing.

What you need before you start

- A client list with an email address and the services for each client, even just a spreadsheet.
- One folder structure that everyone uses.
- The standard list of documents for each service.

Using AI safely with client data

Useful, fast, and easy to get wrong. A short checklist.

Good jobs for AI in a small firm

- Sorting and labelling incoming email and documents (#9, #21).
- Drafting replies, summaries and letters **for a person to check** (#11, #20, #23).
- Pulling key fields out of documents, such as dates, amounts and names, as suggestions.

Keep these with a person

- Anything that is advice: tax positions, claims, what a client should do.
- AML and ID decisions.
- Final numbers in a return or a set of accounts.
- Price changes and anything sensitive with a client.

Before connecting any AI tool

1. **Where does the data go?** Choose business plans that don't train on your data, and check the region it's stored in.
2. **Is there a data processing agreement?** You need one for client personal data under UK and EU GDPR.
3. **Can you switch it off?** Every automation should have an obvious pause button.
4. **Is it written down?** Add each tool to your privacy notice and record of processing.
5. **Do you check the output?** Spot-check 1 in 10 outputs for the first month, even when it looks perfect.

This is a practical checklist, not legal advice. If in doubt, ask your data protection adviser or professional body.

Tool cheat sheet

What each kind of tool is for. You probably already pay for half of these.

Type	Examples	Use it for
Automation glue	Zapier, Make, Power Automate, n8n	Connecting tools: "when X happens here, do Y there". Most of the 25 use one of these.
Practice management	Karbon, TaxDome, Xero Practice Manager, Senta, IRIS	Jobs, client requests, deadlines and the client portal. Check the built-in automations first.
Accounting	Xero, QuickBooks, FreeAgent, Sage	Invoices, payment reminders and bank feeds (#16-18).
Receipts and documents	Dext, Hubdoc, AutoEntry	Reading receipts and invoices into the books (#9, #18).
Forms	Microsoft Forms, Google Forms, Jotform, Typeform	Intake and onboarding (#2).
E-signature	DocuSign, Adobe Sign, built-in practice tools	Engagement letters (#3).
Scheduling	Cal.com, Calendly, Microsoft Bookings	Calls and reminders (#13).
Email and files	Microsoft 365, Google Workspace, Dropbox	Where reminders are sent from and files are kept (#7, #8).
AI assistants	Copilot, Gemini, ChatGPT/Claude business plans	Drafts, summaries and sorting, always checked by a person (#11, #21, #23).
Meeting notes	Teams or Zoom summaries, Fireflies, Otter	Turning calls into actions (#23).

Build, buy or get help?

- **Buy** when your practice software already does it. Switch the feature on first.
- **Build it yourself** when it's a simple "when this, then that" between two tools you already use.
- **Get help** when it spans several tools, needs to be reliable in deadline season, or nobody in the firm has time to look after it.

Where to start

If you only do one thing this month, do **#7 (reminders that stop themselves)** together with **#10 (the morning list)**. Together they take most of the chasing off your team without changing how clients work with you.

A simple way to choose

1. **Count it:** for one week, tally how often each task on the list happens. Rough is fine.
2. **Score it:** times per week × minutes each. The biggest number wins.
3. **Check it:** is it done the same way every time? If not, write the steps down first.
4. **Pilot it:** run it with 10 friendly clients for two weeks before switching it on for everyone.

Your shortlist

#	Automation	Do we need it?	Priority (1-3)
07	Reminders that stop by themselves	☐	
10	Morning "still outstanding" list	☐	
06	Personal checklist per client	☐	
08	Uploads filed automatically	☐	
01	Instant enquiry reply	☐	
12	Deadline reminders per client	☐	
17	Overdue invoice reminders	☐	
___	_____	☐	

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