Small accountancy and bookkeeping practice

7 self-paced online modules, 20 minutes each (2 hours 20 minutes total). Suggested pace: two to three weeks.

1. **Baseline check:** a short check across all the skills in the course, so your team can see where it starts.
2. **Citations and guidance:** AI-quoted rules, rates, thresholds and guidance checked against the source provided.
3. **Document summaries:** AI summaries of engagement letters, client records and meeting notes that add, drop or change a detail.
4. **Client correspondence:** AI-drafted letters and emails that turn an estimate into a promise, such as a refund amount or completion date for accounts.
5. **Dates, deadlines and figures:** filing dates, year ends, tax periods, totals and percentages that don't match the source workings.
6. **Safe use of AI:** what client information must stay out of AI tools, and which outputs need review before they leave the practice.
7. **Follow-up check:** comparable but different examples, to compare performance with the baseline check.

What your practice receives

- A team report comparing baseline and follow-up performance, with suggested next steps.
- A certificate of completion (not CPD-accredited) for each participant who finishes.
- 12 months' access to the tailored drills.
- Practice uses fictional documents modelled on your work. No client documents needed.