

SAMPLE REPORT: the business below is fictional. It shows the format and depth of a real report.

✔ PurposeFit AI · AI Tool Audit

Example: a 6-person Leeds bookkeeping firm

Prepared for: “Aire Ledger Bookkeeping” (fictional) · **Report date:** 18 October 2026 · **Tools and prices checked:** 17 October 2026

Your setup (from your questionnaire): 6 people · Microsoft 365 · Xero for client books · Windows laptops and iPhones · budget up to about £100 a month for new tools · mixed comfort with new tech

1. Summary

You listed **6 tasks**. For each one we’ve picked one tool that fits your setup, plus an alternative, and written a step-by-step setup guide with a ready-to-use prompt or template. Three things shaped the picks: you already pay for Microsoft 365, you handle client financial data every day, and half the team is less comfortable with new tech. So we’ve leaned on tools you already have or that need very little setup, and we’ve kept client data out of anything that doesn’t need it.

Biggest win: AI meeting notes for client review calls (task 2) and email drafting in Outlook (task 1).

Estimated time saved across all 6 tasks: about 6–7 hours a week across the team **ESTIMATE**

Estimated extra spend to start: £0. Every pick has a free plan or is something you may already have. If the trials work, expect roughly US\$25–50 a month, mainly Otter Pro for 3–6 people (see each task).

#	Your task	Recommended tool	Alternative	Time saved EST.
1	Chasing clients for missing records	Microsoft Copilot (Outlook)	ChatGPT	1–1.5 h/week
2	Writing up client review calls	Otter.ai	Fireflies.ai	2–3 h/week
3	Building and fixing Excel formulas	Formula Bot	Microsoft Copilot (Excel)	~1 h/week
4	Setting up new clients (re-keying details)	Zapier	Make	~2 h/month
5	Monthly client deadlines newsletter	Claude	Microsoft Copilot (Word)	~1.5 h/month
6	Proofreading client letters	Grammarly	Microsoft Copilot (Word)	~1 h/week

Time-saved figures are our estimates, based on the frequency and duration you gave us. They are not measured results. Track them in your first month (see the rollout plan).

2. Task-by-task recommendations

TASK 1

Chasing clients for missing records and receipts

You said: weekly, about 3 hours a week across two people. Done now in Outlook, written from scratch each time.

Recommended	Microsoft Copilot , used inside Outlook (copilot.microsoft.com)
Why it fits you	You already work in Microsoft 365, and Copilot works inside Outlook, Word, Excel and Teams, so the team doesn't need a new app. It drafts a polite, firm chaser from a one-line prompt, in your tone.
Alternative	ChatGPT (chatgpt.com): good all-round drafting if your Microsoft plan doesn't include Copilot in Outlook.
Rough cost	Freemium. Which Copilot features you get inside Outlook depends on your Microsoft 365 plan and any Copilot add-on, so see current pricing . ChatGPT: Freemium, see current pricing .
Time saved	1–1.5 hours a week ESTIMATE

Your setup guide: Copilot in Outlook for Aire Ledger

Steps checked against Microsoft's and OpenAI's official help pages on 18 October 2026. Menus can change; if a step looks different, follow the linked help article.

- 1. Sign in and choose your plan.** The two people who send chasers sign in to Outlook with their usual **work** Microsoft 365 account, not a personal Microsoft account. Whether Copilot appears in Outlook depends on your Microsoft 365 plan and any Copilot add-on. Microsoft's advice if you can't see it is to check with whoever manages your Microsoft 365 account ([Microsoft help](#)). With a budget of about £100 a month for six people, don't add Copilot for everyone on day one. Trial it with these two people first, and [see current pricing](#) before buying more. No Copilot in Outlook? Use the alternative, ChatGPT, on its free plan for the trial (step 2 covers the privacy setting).
- 2. Check the privacy position before any client email goes in.** When you use Copilot with your work account, Microsoft says your prompts and responses are covered by its Data Protection Addendum, and that they aren't used to train its foundation models ([Microsoft: enterprise data protection](#)). If you use ChatGPT instead, go to *Settings* → *Data controls* and turn off *Improve the model for everyone* ([OpenAI help](#)). OpenAI notes that rating a reply with thumbs up or down can still send that conversation for training, so skip the ratings.

3. **Connect it to what you already use.** You're on Windows laptops and iPhones. Microsoft's help article covers Copilot drafting in the new Outlook for Windows, classic Outlook, Outlook on the web and Outlook for iOS. In the new Outlook and on the web, *Draft with Copilot* doesn't work with plain-text emails, so set *Settings* → *Mail* → *Compose and reply* to **HTML**. Copilot doesn't need to connect to Xero for this. Take the list of missing items from Xero yourself, and only type in the item types, not the figures.
4. **Save your three chaser prompts where the team can find them.** Put them in one shared Word document or OneNote page called "Chaser prompts": first reminder, second reminder (firmer) and final reminder. The prompt in step 5 is the first one. For the other two, change the tone line.
5. **Your first run.** In the new Outlook, select *Home* → *New mail*, then the Copilot icon in the toolbar, then *Draft*. Paste this prompt, fill in the brackets and select the Generate arrow ([Microsoft help](#)):

Write a short, friendly but firm email to a bookkeeping client.
We are Aire Ledger Bookkeeping. We need their records to prepare their [VAT return / year-end accounts].
Still missing: [e.g. March bank statement; receipts for purchases over £50 in Q1].
Please ask them to send these by [date]. Our own deadline is [date].
Tone: warm, plain British English, no jargon. Under 120 words.
End with one clear action: reply to this email with the documents attached.
Don't mention penalties, fines or amounts, and don't add any dates or figures I haven't given you.
Sign off as [your first name], Aire Ledger Bookkeeping.

6. **Check the draft. Here's what good looks like.** The email is under about 120 words. It lists exactly the items you gave it, and both dates match yours. It ends with one clear action, and there are no penalty threats or figures you didn't provide. If it's too long or too stiff, use Copilot's tone and length options or regenerate it. When you're happy, select *Keep it*, then read it once more before you send. The person sending is responsible for every date in it.
7. **Make it a habit.** Do it every Monday morning, as part of your weekly chase list, with the same two people. Once the prompts are saved, each chaser should take about 2–5 minutes instead of writing from scratch **ESTIMATE**. Note the time for the first two weeks for your baseline (see the 30-day plan).
8. **Common pitfalls.**
 - **Copilot icon missing:** check the email is HTML, not plain text (step 3), then check your plan.
 - **Made-up deadlines:** AI tools sometimes add a "helpful" date or an HMRC penalty. The prompt tells it not to, but always check.
 - **Too much client data in ChatGPT:** if you use the ChatGPT alternative, use the bracket placeholders and paste the result into Outlook. Never paste bank details, UTRs or NI numbers.
 - **Everyone writing their own prompts:** one shared document keeps the tone consistent across the firm.

TASK 2

Writing up client review calls

You said: about 8 calls a week on Teams, 20–30 minutes each to write up notes and actions afterwards.

Recommended	Otter.ai (otter.ai)
Why it fits you	It records, transcribes and summarises meetings, works with Teams, and has a free plan big enough to trial with one person. Your write-ups become a quick check and edit instead of a 25-minute job.
Alternative	Fireflies.ai (fireflies.ai), if you want notes sent into other tools automatically. If clients don't want a bot joining, look at Granola , which uses your device's audio instead.
Rough cost	As listed on 17 Oct 2026: Otter Basic is free with 300 transcription minutes a month. Otter Pro is US\$8.33 per user a month billed annually (US\$16.99 monthly). Fireflies Pro is US\$10 per seat a month billed annually. UK VAT may be added. See current pricing .
Time saved	2–3 hours a week across the team ESTIMATE

Your setup guide: Otter.ai for Aire Ledger's Teams calls

Steps checked against Otter's official help centre and privacy policy on 18 October 2026, and prices on 17 October 2026. Menus can change; if a step looks different, follow the linked help article.

- 1. Sign up and choose your plan.** The person who runs the most client review calls creates a free **Basic** account at otter.ai, using their work Microsoft 365 email. Basic includes 300 transcription minutes a month (as listed on 17 Oct 2026). At about 8 calls a week you'll use that up quickly, so treat Basic as a 1–2 week trial. If it works, move only the people who run client calls to **Pro**, at US\$8.33 per user a month billed annually, or US\$16.99 monthly (as listed on 17 Oct 2026; UK VAT may be added). For two or three people that sits well inside your budget of about £100 a month. Don't buy seats for all six people. ([Otter pricing](#))
- 2. Change these settings first (privacy).** In *Account Settings* → *Meetings*, set *Default-join settings* to **Meetings I manually select**, so nothing is recorded by accident. On **data location**, Otter says it stores data on AWS in the US West region ([Otter help](#)). We found no UK storage option, so record this as an international transfer (see the GDPR notes). On **model training**, Otter's privacy policy (effective 16 June 2026) says it shares data with data-labelling providers to create training data for its features. We couldn't find a setting in its help centre to switch this off. Before recording client calls, email Otter to ask whether your recordings are excluded on the plan you choose. If the answer isn't acceptable for client calls, use the trial on internal meetings only.

3. **Connect it to Outlook and Teams.** In Otter, open *Apps* in the left menu. Under *Connect calendars & contacts*, click *Add* next to **Microsoft** and allow access ([Otter help](#)). Otter syncs only your **primary** calendar, so shared or team calendars won't appear ([calendar help](#)). If Microsoft asks for admin approval, whoever manages your Microsoft 365 account needs to grant Otter the calendar permissions. Otter recommends sorting that out before you connect. Next, complete Otter's extra setup steps for Microsoft Teams, which are linked from its [Notetaker overview](#). Your own Teams settings must also allow guests. The notetaker joins Teams calls as a guest. That means a meeting that makes guests sign in will block it, and if the meeting uses a lobby, someone has to admit it ([troubleshooting](#)).
4. **Tell clients before you record.** The notetaker shows in the call as "[Your name]'s Notetaker (Otter.ai)", and it can't join invisibly ([Notetaker overview](#)). Add the line from the template below to your Teams invites, and say it again at the start of the call.
5. **Your first run.** Use an internal team meeting first. On your Otter home page, switch the toggle on for that meeting ([managing events](#)). Make calendar changes at least 30 minutes before the meeting so they sync. Afterwards, copy Otter's summary into this file-note template:

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INVITE LINE (paste into the Teams invite):
This call will be transcribed by Otter.ai so we can keep accurate notes.
Reply to this email if you'd rather it wasn't, and we'll take notes by hand.

CLIENT FILE NOTE: [Client name], review call [date]
Attendees: [names]
Notes taken with: Otter.ai, checked by [your initials]
Summary (3-5 bullet points, in plain English):
- ...
Decisions:
- ...
Actions (owner + due date for every action):
- [Who] to [do what] by [date]
Anything to check before filing: [figures, dates, names]
Recording deleted on: [date]
```

6. **Check the summary. Here's what good looks like.** Every action has an owner and a date. Names, company names and any figures match what was said. Nothing is attributed to the wrong person. For your first three client calls, compare Otter's summary with your own quick notes. If it keeps getting names or jargon wrong, add them to Otter's vocabulary if your plan offers one. Treat the summary as a first draft, not the record.
7. **Make it a habit.** The person who ran the call files the note the same day, straight after the call. Checking and filing should take about 5–10 minutes instead of 20–30 **ESTIMATE**. On Friday afternoons, delete recordings you no longer need once the notes are filed (see the GDPR notes on retention).

8. Common pitfalls.

- **Auto-join on everything:** this would also catch HR or personal conversations. Keep *Meetings I manually select*.
- **Client Teams settings block the bot:** if a client's meeting requires sign-in, take notes by hand or use Otter's desktop app for recording without a bot ([Notetaker overview](#)). Still ask the client first.
- **Personal accounts:** if staff sign up individually, the notes live in their accounts. Use one work account per person, and agree a retention period.
- **Calendar changes too late:** changes made less than 30 minutes before a call may not sync in time.

9. **More detail:** our guide [How to take AI meeting notes](#).

TASK 3

Building and fixing Excel formulas for reconciliations and templates

You said: several times a week, around 30 minutes each time, often searching forums for the right formula.

Recommended	Formula Bot (formulabot.com)
Why it fits you	It writes and explains Excel and Google Sheets formulas from plain English. The explanations help less-confident team members check what a formula does before they rely on it.
Alternative	Microsoft Copilot in Excel , if your Microsoft 365 plan includes it. It keeps the work inside your existing files.
Rough cost	Freemium. See current pricing .
Time saved	About 1 hour a week ESTIMATE

Your setup guide (summary)

In a real report every task gets a full 6–10 step guide like tasks 1 and 2. It's shortened here to keep the sample brief.

1. Describe the layout, not the data, for example: "Column A is date, B is supplier, C is amount. Sum C where B is 'HMRC' in March".
2. Don't upload client workbooks. Paste only column headers or made-up example rows.
3. Test every new formula on a copy, with a total you've already checked by hand.
4. Keep a shared "formula library" sheet so nobody solves the same problem twice.

TASK 4

Setting up new clients (re-keying details from the enquiry email)

You said: about 3 new clients a month, roughly 1 hour each to create folders, tasks and a row in your client tracker.

Recommended	Zapier (zapier.com)
Why it fits you	It's a no-code automation tool that connects thousands of apps. One "Zap" can take a new enquiry (for example from a Microsoft Form) and create the OneDrive folder, the task and the tracker row automatically.
Alternative	Make (make.com), a visual builder that can work out cheaper for complex flows. pricing unverified
Rough cost	Freemium. The free plan has task and step limits. See current pricing .
Time saved	About 2 hours a month ESTIMATE

Your setup guide (summary)

In a real report every task gets a full 6–10 step guide like tasks 1 and 2. It's shortened here to keep the sample brief.

1. Write down your onboarding steps in order. Automate only the ones that are pure copying.
2. Check Zapier's app directory for each tool you use (Microsoft Forms, OneDrive, Outlook, your practice software) before you build anything.
3. Build one Zap and test it with a made-up client. Turn it on only once it works end to end.
4. Keep ID checks and engagement letters manual. Automation should fill in forms, not make decisions.

TASK 5

Monthly client newsletter on deadlines and changes

You said: monthly, about 3 hours to write and format.

Recommended	Claude (claude.ai)
Why it fits you	It's strong at long-form writing and careful editing. Give it your bullet points and last month's issue and it drafts in your style. It's also good at rewriting technical points in plain English for clients.
Alternative	Microsoft Copilot in Word , if your plan includes it. For the header graphic, Canva (Freemium) is the easiest option for non-designers.
Rough cost	Freemium. See current pricing .
Time saved	About 1.5 hours a month ESTIMATE

Your setup guide (summary)

In a real report every task gets a full 6–10 step guide like tasks 1 and 2. It's shortened here to keep the sample brief.

1. Start from your own bullet points. Don't ask the AI to tell you what the deadlines are.
2. Check every date, rate and threshold against GOV.UK before sending. AI tools can state old or wrong figures confidently.
3. Save a "house style" prompt (tone, length, sign-off) and reuse it every month.

TASK 6

Proofreading client letters and engagement letters

You said: several times a day, 5–10 minutes each, mainly for the two newer team members.

Recommended**Grammarly** ([grammarly.com](https://www.grammarly.com))**Why it fits you**

It checks grammar, spelling, tone and clarity as you type in Outlook, Word and the browser, with no change to how people work. That suits the less-confident team members.

Alternative

Microsoft Copilot in Word, for rewriting whole paragraphs if your plan includes it.

Rough cost

Freemium. [See current pricing](#).

Time saved

About 1 hour a week **ESTIMATE**

Your setup guide (summary)

In a real report every task gets a full 6–10 step guide like tasks 1 and 2. It's shortened here to keep the sample brief.

1. Install the free version for the two newer team members first.
2. Set the language to British English.
3. Keep engagement-letter wording that your professional body or insurer has approved. Don't let the tool rewrite it.

3. Your 30-day rollout plan

Days 1–7

Agree a one-page AI use rule (what client data may never go into an AI tool). Turn on Copilot or ChatGPT for email chasers (task 1). Install Grammarly for two people (task 6). Write down how long tasks 1–6 take this week as your baseline.

Days 8–14

Offer free plan for one person on internal meetings, then on 2–3 client calls where the client agrees (task 2). Add the notetaker line to your meeting invites.

Days 15–21

Formula Bot for the next three formula jobs, then start the shared formula library (task 3). Map onboarding steps and build one test Zap (task 4).

Days 22–30

Draft this month's newsletter with Claude and fact-check it (task 5). Compare time spent with your week-one baseline. Decide which tools are worth paying for, and cancel any trials you won't keep before they renew.

4. GDPR and data notes

- **You are the controller** of your clients' personal data. When an AI tool processes it for you, that provider is usually your processor. Before you put client data into a tool, check it offers a data processing agreement (DPA) and tells you where data is stored.
- **International transfers:** several of these providers are US-based. Check which safeguard they rely on, such as the UK Extension to the EU-US Data Privacy Framework or the ICO's IDTA or Addendum, and record it.
- **Model training:** check each tool's settings and terms for whether your inputs are used to train its models. Turn this off where you can, and prefer business plans for anything involving client information.

- **Recording calls:** tell clients before recording. Give them a simple way to say no, and set a retention period for recordings and transcripts (for example, delete recordings after the notes are filed).
 - **Keep identifiers out:** leave bank details, UTRs, NI numbers and ID documents out of general-purpose AI chats.
 - **Update your own privacy notice** to mention AI notetaking and any new processors. Check your ICO data protection fee is up to date.
 - Your anti-money-laundering supervisor and professional body may have their own guidance on technology and record-keeping. Follow it where it is stricter than this report.
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5. What to skip (for now)

- **A website AI chatbot** (for example Tidio or Chatbase). You get only a few web enquiries a week, so a chatbot adds cost and risk (wrong answers about tax) for little gain.
 - **A paid AI email client** (for example Superhuman, a paid tool). It overlaps with Outlook plus Copilot, and switching email clients is disruptive for a mixed-confidence team.
 - **Uploading client ledgers to general AI data-analysis tools** until you've checked their DPA and data location. Use your existing Xero reports for client numbers.
 - **Buying every seat on day one.** Prove each tool with one or two people first, then upgrade.
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6. About this report

Independence: our recommendations are never influenced by affiliate commissions. Any affiliate link in a report is marked **Ad**, and the order of picks never changes because of one. *This sample contains no affiliate links.*

Prices and features are as shown on each provider's own website when we checked (17 October 2026), or marked "see current pricing" where they vary by plan. Prices change, may be shown in US dollars, and UK VAT may be added at checkout. Tools marked **pricing unverified** could not be checked automatically, so confirm on their site.

Time saved figures are estimates based on what you told us, not guarantees.

General guidance only: this report is general information about software tools. It is not legal, financial, tax or data protection advice. Check anything important with a suitably qualified adviser.
