What AI can automate for your firm

Ten high-impact systems we build for accounting and bookkeeping firms — beyond chat, into the workflow.

01 **Document Chasing Agent**
Tracks missing client docs, sends polite follow-ups, escalates stale requests, adjusts tone by deadline.

02 **WhatsApp Intelligence Layer**
Extracts structured data from chats, voice notes, and photos. Tracks task status. Generates daily summaries.

03 **Chat With Your Data**
"Which clients are most time-consuming?" Plain-English answers from your books, SOPs, and prior workpapers.

04 **Advisory Meeting Prep**
Auto-generates monthly client packets — P&L highlights, cash, KPIs, talking points.

05 **Tax Document Parser**
Parses K-1s, 1099s, W-2s, and prior-year returns into structured data. Validates totals; flags gaps.

06 **Pricing Proposal Builder**
Turns intake calls into fixed-fee proposals — priced by volume, entities, payroll, cleanup, risk.

07 **Scope-Creep Detector**
Watches client activity vs. engagement scope. Auto-drafts change orders when thresholds are crossed.

08 **Compliance Deadline Tracker**
Filing calendar by entity type. Staff and client reminders. Risk alerts as deadlines approach.

09 **Transaction Coding Assistant**
Learns each client's chart of accounts. Suggests coding with confidence. Flags duplicates and anomalies.

10 **Continuous Audit Monitor**
Nightly mini-audit per client — backdated entries, duplicate payments, suspicious categorization.

Want one of these in your firm? Have a workflow eating your week?

Pick the easiest way to reach us — we'll come back within one business day.

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ACCOUNTING PRICING SURVEY

Are you underpriced?

A few questions, deep insights into your peers' pricing.

ANONYMOUS · ~3.5 MIN

GALLOP SYSTEMS

FOR ACCOUNTANTS & BOOKKEEPERS

A POCKET REFERENCE

The GALLOP formula for prompting AI

Six moves that turn a vague request into a useful answer. Each letter, an example you can lift today.

G — **GOAL** — *define the specific outcome.*
"Draft a tax advisory memo for an NYC S-corp on the wages-vs-distribution tradeoff for a 35% shareholder-employee earning $180K."

A — **AUDIENCE** — *say who's reading.*
"The reader is a first-time small business owner with no accounting background. They're nervous about IRS audits — anticipate that."

L — **LOGIC** — *give step-by-step rules.*
"Review this trial balance: (1) flag accounts that moved >5% from prior period; (2) check each for a journal-entry explanation; (3) summarize as needs-explanation vs. looks-normal."

L — **LIMITS** — *bound scope, length, tone.*
"Under 150 words. Warm advisory tone — like a trusted family CPA. 9th-grade reading level; define any technical term in the same sentence."

O — **OUTPUT** — *specify the format.*
"Two-column comparison table: revenue recognition, expense recognition, complexity, IRS eligibility (under $30M), best fit. Below it, one paragraph labeled 'Bottom line:'"

P — **PATTERN** — *show what good looks like.*
"Categorize like these examples — STAPLES $47.82 → Office Supplies (known vendor); DELTA AIR $612.40 → Travel: Airfare; AMZN MKTP $89.15 → Needs review (Amazon ambiguous). Now categorize: [txn]"

• 02 · FOR ACCOUNTANTS

Five prompts to steal

Drop-in prompts for the work that fills your week. Fill the [brackets], paste, refine.

01 Client Email Triage

LOGIC

Read the email below. In order: (1) state the core question in one sentence; (2) list every deadline with its date; (3) list what info I still need from the client; (4) draft a reply that either answers or asks for the missing info — under 120 words, warm but efficient.

Email: [paste]

02 IRS / State Notice Response

LOGIC + LIMITS

Walk through this notice in order: (1) what the agency is asserting, in plain language; (2) which year and issue; (3) whether the assertion looks correct given the facts; (4) what documentation I'll need; (5) a draft response under 300 words — professional, non-confrontational. Flag anything that looks like a scam first.

Notice: [paste]

03 Client-Ready Explanation

AUDIENCE

Explain [tax concept] to a small business owner with no accounting background. 9th-grade reading level; define any technical term in the same sentence. Use a real-dollar example with round numbers. Under 150 words. End with one sentence labeled "What this means for you:" with a practical takeaway.

04 Meeting Prep Brief

GOAL

I have a meeting with a [client type] about [topic]. Produce: (1) a one-paragraph summary of the issues at stake; (2) five smart questions — ones that surface info I don't already have, not ones I can guess; (3) three things to watch for (red flags, avoidance, opportunities); (4) one sentence on what a good outcome looks like.

05 Scope-Creep Reply

LOGIC + LIMITS

A client is asking for work outside our engagement scope. Draft a reply that does three things in order: (1) acknowledges the request and shows I understand it; (2) clearly states it's out of scope — not defensive, not apologetic; (3) offers a concrete path forward (scoped add-on, referral, separate engagement). Warm, direct, not subservient. Under 150 words.

Their request: [paste]

Copy. Customize the brackets. Paste. The formula does the work.

• 03 · FOR BOOKKEEPERS

Five more to steal

Built for the day-to-day — cleaning books, closing months, keeping clients in the loop.

01 Transaction Categorization

PATTERN + OUTPUT

For each bank-feed transaction below, return: suggested category (standard CoA), confidence (High / Med / Low), one-line reason. Mark Low if vendor is ambiguous (Amazon, PayPal, Square), amount is unusual for that vendor, or description suggests personal use. For Low items, include the exact question I should ask the client. Output as a table.

Transactions: [paste]

02 Bank Rec Discrepancy

LOGIC

A reconciliation has a [$amount] difference I can't resolve. Walk through likely causes in order of probability: (1) timing (uncleared checks, deposits in transit); (2) transposition — check if difference is divisible by 9; (3) duplicate or missing entries; (4) bank fees / interest not yet recorded; (5) prior-period errors carried forward. For each, give the specific check to run and what would confirm or rule it out.

03 Unusual Balance Flag

LOGIC + LIMITS

Flag anything unusual on this trial balance, in order: (1) accounts with sign opposite their normal balance; (2) balances that moved >25% from prior month; (3) clearing or suspense accounts that should be zero; (4) A/R or A/P aging items over 90 days; (5) negative cash. For each, write one sentence on the most likely cause and one on what to investigate first.

Trial balance: [paste]

04 Ask My Accountant Cleanup

OUTPUT + PATTERN

For each transaction sitting in Ask My Accountant: (1) suggest the correct category; (2) state the likely business purpose in one sentence; (3) rate confidence; (4) for Low confidence, write the exact question for the client — phrased so they can answer in one sentence. Group as: Ready to Reclassify · Need Quick Confirmation · Need Documentation. Table per group.

Transactions: [paste]

05 Client Financial Narrative

OUTPUT + AUDIENCE

Write a financial narrative for a business owner with no accounting background, covering [period]. Structure: (1) Headline — one sentence on the period's main story; (2) Revenue — what changed and why; (3) Expenses — biggest movers and outliers; (4) Cash — current position and runway; (5) Watch List — two or three to watch. Round to nearest $100. Four paragraphs. End with one suggested question for our next call.

Same playbook, different desk. Fill the brackets — the structure does the rest.