



AI in Accounting & Financial Advisory



The biggest opportunity in accounting and financial advisory isn't replacing accountants. It's reducing the time spent on manual data entry, reconciliation, and compliance reporting so teams can focus on strategic financial advice. AI helps accounting firms process financial data faster, automate reporting, and surface insights that help clients make better business decisions.

Common Challenges

- ▶ **Data Entry & Bookkeeping**
Significant time spent manually processing invoices and receipts.
- ▶ **Bank Reconciliation**
Matching transactions across accounts is manual and time-consuming.
- ▶ **Tax & Compliance Reporting**
Preparing tax returns and compliance documents requires detailed review.
- ▶ **Financial Analysis**
Identifying trends and anomalies across client accounts takes time.
- ▶ **Client Queries**
Accounting teams handle frequent repetitive questions about tax and payroll.
- ▶ **Reporting Cycles**
Month-end and year-end reporting processes are often delayed by manual work.

AI Assistants

Productivity inside tools like Excel, Outlook and accounting software.

- ▶ Financial summary drafting
- ▶ Client meeting notes
- ▶ Email drafting for client updates

Outcome

Faster communication and reduced administrative workload.

Automation

Removes repetitive accounting processes.

- ▶ Automated invoice processing
- ▶ Automated bank reconciliation
- ▶ Tax and compliance reporting automation

Outcome

Faster month-end reporting and improved accuracy.

AI Agents

AI agents interact with financial data and support accounting teams.

- ▶ Financial insights agent
- ▶ Tax and compliance knowledge agent
- ▶ Client advisory agent

Outcome

Faster access to financial insights and improved client advisory services.

Real World Example

KPMG

KPMG AI Audit & Tax Platform — KPMG uses AI to automate audit and tax processes, allowing teams to analyse large volumes of financial data significantly faster.

Results include:

- ▶ Faster audit cycles
- ▶ Improved identification of financial anomalies
- ▶ More time focused on strategic client advice — AI allows accounting firms to scale their services and deliver more proactive financial guidance.

A Simple ROI Example

- 1 Number of Employees**
30 employees across the business
- 2 Time Spent on Repetitive Tasks**
Significant time lost weekly to manual processes and admin
- 3 Time Recovered With AI**
AI assistants, automation and agents typically recover 10–12 hours per employee per week

EXAMPLE BUSINESS IMPACT

- ▶ **Time Saved:** 10 hours per employee per week
- ▶ **Organisation:** 30 × 10 hrs = 300 hours/week
- ▶ **Annual Hours:** 300 × 52 = 15,600 hours recovered
- ▶ **Value:** At £25/hr = **£390,000** capacity unlocked

15,600

Hours of Productivity Every Year

£390k

Equivalent Operational Capacity

AI ROI is not about replacing people. It's about empowering teams to spend less time on repetitive work and focus on higher-value activities.

Assess Your AI Readiness

⚠ The Risk of Getting AI Wrong

Deploying AI without the right foundations is like **building a skyscraper on a swamp**. Shadow AI creates serious data, security and compliance risks.

AI adoption involves **data, security, governance, compliance and operational change**. This is why organisations turn to MSPs like Jera IT to guide their AI journey safely.

Our AI Readiness Assessment ensures the right foundations are firmly in place before deployment.



Business, Strategy & People Readiness

Strategic alignment and cultural preparedness for AI adoption.



M365 Technical & Infrastructure Readiness

Is your Microsoft 365 environment ready for AI to work reliably?



Data, Security & Governance Readiness

Will data be surfaced safely, securely and compliantly?



Adoption, Change & Operating Model Readiness

Who will own AI and will adoption truly stick?

[Book Your AI Readiness Assessment →](#)

AI & Automation Discovery Workshop

The real challenge isn't knowing *if* AI can help — it's knowing *where it delivers the greatest impact first*. Our workshop identifies your highest-value opportunities and builds a clear adoption roadmap.

- 1 Uncover Repetitive Work Tasks**
Identify manual processes that can be automated, freeing up valuable employee time.
- 2 Spot AI Agent Opportunities**
Pinpoint where agents can retrieve information, support decisions and automate tasks.
- 3 Remove Information Bottlenecks**
Identify where employees lose time searching for documents, data or knowledge.
- 4 Prioritise High-Impact Use Cases**
Focus on AI opportunities most likely to deliver fast ROI and measurable gains.

Typical Workshop Outcome:

- ▶ A clear list of AI opportunities across your organisation
- ▶ Prioritised use cases based on business impact
- ▶ A practical AI adoption roadmap for the next 12–24 months
- ▶ Guidance on governance, security and responsible AI deployment

[Request an AI Discovery Workshop →](#)

Why Scottish Businesses Choose Jera IT for AI

- 1 Scotland's Only MSP with a Dedicated AI Adoption Programme**
The Jera AI Readiness Programme is the only structured AI adoption service built specifically for Scottish businesses — covering readiness, governance, deployment, and measurable outcomes. No other Scottish MSP offers this end-to-end.
- 2 Microsoft Solutions Partner with Deep Security Expertise**
Microsoft Solutions Partner and Cyber Essentials Plus certified. We achieve an average Microsoft Secure Score of 74% for our clients, against an industry average of 31% — your AI deployment is built on a properly secured foundation.
- 3 AI Governance Isn't an Add-On. It's How We Start.**
We map your data, establish access controls, identify shadow AI exposure, and deploy Copilot within your own Microsoft 365 tenant — so your client data, your IP, and commercially sensitive information never enters a public AI model.
- 4 We Measure What AI is Worth Using OI Scoring**
Our Operational Intelligence Scoring system measures time saved by department across your business — giving you a clear, auditable return on your AI investment that you can present to your board, not just believe in.
- 5 Three Scottish Offices. Onsite When You Need Us.**
Edinburgh. Aberdeen. Glasgow. When AI deployment needs hands-on support — training your team, configuring your environment, embedding tools into how people actually work — we're already here, not a remote team who visits quarterly.
- 6 Training Scotland's Next AI Professionals**
Through the Jera IT Academy, we're investing in Scotland's AI and cyber security talent pipeline. Our knowledge of what's coming in AI is current, deep, and built from the ground up — not sourced from vendor briefing notes.