

SubAI CPA Firm Automation Portfolio

40 opportunities for tax and audit practices

Examples to explore with your firm. The work we agree to build depends on your priorities and what your systems can support.

SubAI checks your existing software first, configures useful features, and manages automation for the manual steps between systems. We confirm what is possible before agreeing on a build. Each entry shows its main value:

- Cost workflow: Reduce time spent on routine tasks, coordination, and correcting mistakes.
- ◆ Revenue workflow: Help inquiries become engagements and keep revenue opportunities from being missed.
- Data foundation: Keep information accurate across systems so reports and automation can rely on it.

Client intake and document coordination

Organize client information and follow-up across your tax and audit practices.

01 Engagement setup

- Cost workflow

What starts it: Your firm accepts a new engagement or renews an existing one.

What it does: Check signed terms, services, and entity details. From approved intake, create or update matching client records and engagement workspaces across systems. Assign responsibilities and milestones, and follow up on missing information.

What to measure: Engagements set up; setup time; missing information; duplicate records; staff follow-ups; corrections.

02 Client acceptance and independence review

- Cost workflow

What starts it: A prospect, new service, ownership change, or team change needs review.

What it does: Gather relationship disclosures, related entities, proposed services, and earlier decisions. Flag possible conflicts and missing responses. Prepare the records for the designated reviewer and track their acceptance and independence decisions before engagement setup proceeds.

What to measure: Reviews prepared; preparation time; missing disclosures; relevant matches missed; time to a decision.

03 Document sorting and filing

■ Cost workflow

What starts it: Client files, ZIPs, or PDFs containing several document types arrive through a portal, approved link, or email.

What it does: Extract ZIP contents and pull requested pages, such as receipts, from mixed PDFs into separate files. Preserve originals and source page references. Match the client, entity, period, and document type. Check filing, retry incomplete transfers, and flag uncertain selections, duplicates, protected files, or unreadable pages for review.

What to measure: Files and pages accounted for; correct sorting and filing; pages missed or selected incorrectly; staff handling time; duplicate uploads; unresolved problems.

04 Coordinated client document requests

■ Cost workflow

What starts it: Tax and audit teams need some of the same information from a client.

What it does: Compare the teams' requests with documents already received. Identify material they may reuse and prepare a combined follow-up for approval. Send incoming documents to the right teams, with each engagement keeping its own review and acceptance decisions.

What to measure: Requests resolved; duplicate requests; client follow-ups; completion time; items incorrectly marked complete.

05 Client inquiry follow-up

■ Cost workflow

What starts it: An email, voicemail, or approved meeting transcript contains a request.

What it does: Match the inquiry to the engagement, check its status and earlier commitments, and assign someone to respond. Prepare a reply with supporting sources for approval. Track promised actions and open questions through completion, checking for earlier replies to avoid duplicate responses.

What to measure: Inquiries assigned or resolved; correct assignments; reply preparation time; overdue commitments; repeated status requests.

Tax information and preparation

Organize incoming tax information and prepare workpapers for your team to review.

06 Tax organizer review

■ Cost workflow

What starts it: A client returns a tax organizer or preparation is approaching.

What it does: Compare the answers with prior-year documents, known client changes, and the current request list. Identify missing forms and conflicting answers. Check existing uploads before asking again, prepare one follow-up for approval, and update what is ready as usable documents arrive.

What to measure: Organizers checked; delays starting preparation; missing items found late; duplicate requests; accuracy of readiness status.

07 K-1 tracking

■ Cost workflow

What starts it: An expected Schedule K-1 is missing, received, or corrected.

What it does: Track expected K-1s by entity and owner. Check the year, recipient, attachments, and corrected versions. Show which returns are waiting on a missing K-1 and notify the responsible staff when a change needs another review.

What to measure: K-1s correctly matched; missing K-1s; incorrect matches; missed corrections; time returns spend waiting.

08 Tax document extraction

■ Cost workflow

What starts it: Tax forms, statements, or client schedules are ready to process.

What it does: Extract the agreed figures and details into a workpaper or supported software import. Link figures to source pages, check totals, and identify duplicate or corrected documents. Send uncertain values and unreadable sections for review before an approved import proceeds.

What to measure: Workpapers prepared; accurate values; figures with source references; differences in totals; preparation and review time; import corrections.

09 Book to tax reconciliation

■ Cost workflow

What starts it: A client's books and tax workpapers contain unexplained differences.

What it does: Trace balances through the trial balance, ledger, prior adjustments, and supporting schedules. Identify which differences have support and what remains unexplained. Prepare findings with source references and missing information. The preparer reviews proposed tax treatments and adjustments.

What to measure: Investigations completed; investigation time; unexplained balances; unsupported explanations; reviewer corrections; how long differences remain unresolved.

10 Fixed asset reconciliation

■ Cost workflow

What starts it: Current asset records, purchase documents, or disposal details arrive.

What it does: Compare the asset register with ledger activity, invoices, and prior tax schedules. Identify additions, disposals, duplicate assets, and missing dates or costs. Prepare supported updates and a reconciliation for review. Use the firm's calculation tools to apply approved depreciation choices.

What to measure: Asset schedules reconciled; unmatched assets; missing support; unexplained differences; preparation time; reviewer changes.

Tax review and research

Investigate discrepancies and gather the records reviewers need to resolve them.

11 Tax return discrepancy review

■ Cost workflow

What starts it: A draft return is ready or the tax software flags a discrepancy.

What it does: Compare return figures with source documents, workpapers, prior-year amounts, and available software warnings. Investigate missing forms, inconsistent totals, and unexpected changes. Give the reviewer supported explanations or specific questions, then recheck approved corrections.

What to measure: Returns checked; relevant problems missed; unnecessary alerts; investigation time; review corrections; repeat issues.

12 Basis and carryforward tracking

■ Cost workflow

What starts it: Prior-year schedules are carried forward or new activity changes an existing balance.

What it does: Check opening balances against approved prior schedules and trace current changes to supporting records. Flag missing history, inconsistent ownership details, and conflicting carryforwards. Prepare a schedule showing how balances changed and questions for the tax professional to resolve.

What to measure: Schedules prepared; unexplained differences; missing history; errors carrying balances forward; preparation and review time.

13 Multistate tax review preparation

■ Cost workflow

What starts it: A client reports new locations, workers, property, sales, or registrations.

What it does: Organize activity by jurisdiction, compare it with prior filings and registrations, and identify missing information. Prepare the facts with source links and questions about possible filing requirements. The tax professional decides the obligations, allocation methods, and advice.

What to measure: Reviews prepared; completeness of facts; jurisdictions missed; conflicting records; research preparation time; outstanding follow-up.

14 Tax research support

■ Cost workflow

What starts it: A tax professional assigns a question, tax year, and jurisdiction.

What it does: Use suitable research tools approved by your firm and sources it can access to prepare a cited brief tied to the client's facts. Check quotations and references against the sources. Identify effective dates, conflicting guidance, and unresolved questions for professional review.

What to measure: Research briefs delivered; valid citations; correct dates and jurisdictions; relevant authority missed; research and review time.

15 Tax review follow-up

■ Cost workflow

What starts it: A reviewer raises questions or returns work to the preparer.

What it does: Connect each question to the affected return field, workpaper, and source. Gather answers already available, assign missing work, and prepare proposed resolutions. Recheck revised amounts and references, then return the findings to the reviewer for clearance.

What to measure: Review questions cleared; time questions remain open; repeated questions; revision cycles; clearance time; questions reopened.

Tax filing and advisory

Keep approved filings moving and prepare information for client advice.

16 Filing readiness checks

■ Cost workflow

What starts it: A signed filing authorization arrives or a return or extension nears the filing deadline confirmed by your firm.

What it does: File signed authorizations to the correct client and period. Check reviewer clearance, return version, signatures, software warnings, and payment instructions. Flag missing or conflicting items. Update readiness status only when the agreed checks pass, and prepare the checklist for the authorized filer. Payment actions require separate authorization.

What to measure: Filing packages checked; incomplete packages; signature delays; wrong versions; last-minute issues; checking time.

17 E-file status and rejection follow-up

■ Cost workflow

What starts it: The filing software records a submission or acknowledgment.

What it does: Track federal and state status separately and keep the acknowledgments. Flag missing responses or rejections, gather the rejection details, and assign someone to correct them. Track authorized resubmissions through acceptance and prepare client updates for approval.

What to measure: Acknowledgments tracked; correct status; unresolved rejections; missing acknowledgments; time to acceptance; items closed too soon.

18 Tax notice response preparation

■ Cost workflow

What starts it: An agency notice arrives or an agreed response step is due.

What it does: Match the notice to the taxpayer, period, filed return, and available payment records. Record the stated response date for staff confirmation. Investigate discrepancies, gather supporting documents, and draft a response for review. Track approved follow-up and agency replies.

What to measure: Notice reviews prepared; correct matches; response dates confirmed; preparation time; missing support; time notices remain unresolved.

19 Estimated tax and planning preparation

■ Cost workflow

What starts it: A planning meeting or estimated payment review confirmed by the firm is due.

What it does: Gather current results, prior returns, recorded payments, and client assumptions. Check the inputs and run scenarios through approved calculation tools. Show the assumptions, differences, and unanswered questions for professional review before advice or payment instructions are issued.

What to measure: Planning reviews prepared; accurate inputs; missing assumptions; calculations that do not reconcile; preparation time; reviewer corrections.

20 Client changes and advisory follow-up

■ Cost workflow

What starts it: A client reports a transaction, ownership change, expansion, or major life event.

What it does: Gather the facts from approved communications and records, and compare the change with the existing engagement. Prepare a brief for the responsible tax professional. Track approved information requests, planning tasks, and client follow-up until there is a recorded next step.

What to measure: Client changes sent for review; relevant changes captured; unsupported alerts; time to professional review; follow-ups completed.

Individual return filing reference: IRS Publication 1345. Entity and state requirements are confirmed separately when we agree on the work.

Audit planning and data preparation

Check client information and identify missing items before fieldwork begins.

21 Audit document readiness

■ Cost workflow

What starts it: Fieldwork approaches or an item on the provided by client (PBC) request list changes.

What it does: Compare each request with material received, checking the entity, period, version, and required contents. Flag incomplete schedules and unanswered questions. Prepare follow-up for approval and send usable documents for auditor acceptance. Show which procedures are waiting and why.

What to measure: PBC items accepted; items ready before fieldwork; incomplete items missed; duplicate requests; staff follow-up time; procedures waiting on information.

22 Trial balance and ledger reconciliation

■ Cost workflow

What starts it: A trial balance, general ledger export, or revised set of records arrives.

What it does: Put supported files into a consistent format and reconcile ledger activity to trial balance movements. Flag missing periods, duplicates, account mapping changes, or balances that do not agree. Keep the source versions and a record of changes made. Prepare discrepancies for review before audit work uses the data.

What to measure: Data sets reconciled; unexplained differences; missing records found; correct account mappings; preparation time; later rework.

23 Audit file rollforward

■ Cost workflow

What starts it: Your firm opens a new audit period for a recurring engagement.

What it does: Prepare the workspace and current request list using approved templates and the prior file. Identify changed entities, periods, contacts, and unresolved prior issues. Flag content that needs a fresh assessment and leave current-year conclusions and sign-offs for the audit team.

What to measure: Audit files prepared; setup time; outdated references; prior issues missed; rollforward corrections; missing current-year work.

24 Audit planning change review

■ Cost workflow

What starts it: Planning begins or new client information indicates a significant change.

What it does: Compare previously reviewed information with current financial data, minutes, agreements, and client responses. Identify changes in operations, financing, systems, or relationships, with source links and conflicting evidence. Prepare questions for the auditor who decides risks, materiality, and the audit response.

What to measure: Change briefings delivered; relevant changes missed; unsupported alerts; preparation time; agreement with reviewers; open planning questions.

25 Audit population and sample preparation

■ Cost workflow

What starts it: An auditor specifies the records to test and the selection method.

What it does: Check the supplied population against the agreed scope and control totals, and flag gaps. Apply the auditor-approved selection method and record how to reproduce it. Gather selected items and support requests, keeping exclusions and unresolved completeness questions visible for auditor review.

What to measure: Samples prepared; population discrepancies; selections that can be reproduced; incorrect exclusions; preparation time; missing support.

Audit fieldwork and investigation

Find supporting records, investigate discrepancies, and prepare findings for auditor review.

26 Audit evidence matching

■ Cost workflow

What starts it: Supporting records arrive for transactions or balances selected by the auditor.

What it does: Match selected items with invoices, contracts, receipts, or other requested support. Compare the specified details, such as amount, date, counterparty, and approval. Link findings to their sources and flag missing or contradictory records for the auditor to assess.

What to measure: Evidence items matched; correct matches; discrepancies missed; unsupported matches; time finding evidence; reviewer corrections.

27 Journal entry investigation

■ Cost workflow

What starts it: Journal entry checks approved by an auditor identify items to investigate.

What it does: Gather posting details, related transactions, approvals, reversals, and available support. Explain why the entry was flagged and separate documented facts from unresolved explanations. Prepare follow-up questions and track review decisions. A flagged entry is not treated as a finding of fraud.

What to measure: Investigations delivered; relevant issues missed; unnecessary alerts; missing support; investigation time; time to resolution.

28 Analytical review investigation

■ Cost workflow

What starts it: An auditor-defined comparison identifies an unexpected movement or relationship.

What it does: Trace the change through accounts, transactions, periods, and relevant operating data. Check management's explanation against available support and identify contradictory evidence. Prepare an analysis with sources and unanswered questions for the auditor to assess and pursue.

What to measure: Variance analyses delivered; supported explanations; contradictions missed; investigation time; unresolved variances; reviewer changes.

29 Confirmation tracking and follow-up

■ Cost workflow

What starts it: The auditor approves a group of confirmation requests or a response is due.

What it does: Prepare records for the approved confirmation service and track delivery and responses. Flag missing replies or differences, and prepare follow-up for review. Keep the auditor in control of recipients, sending, direct receipt, and evaluation of responses, with a record of each step.

What to measure: Requests tracked; correct status; missing replies; time differences remain unresolved; administrative time; responses with a traceable history.

30 Walkthrough and control documentation

■ Cost workflow

What starts it: A walkthrough is documented or supporting records for a control arrive.

What it does: Organize the process description, participants, control details, and supporting examples. Compare stated procedures with observed or documented evidence. Flag missing periods or inconsistent descriptions. Prepare a workpaper with sources for the auditor to assess design, implementation, and any testing conclusions.

What to measure: Workpapers prepared; correct control details; evidence gaps found; preparation time; unsupported conclusions; reviewer corrections.

Audit completion and review

Check final balances, resolve review notes, and track what is needed before release.

31 Contract and covenant review

■ Cost workflow

What starts it: A lease, debt agreement, amendment, or significant contract needs audit review.

What it does: Extract terms with page references, compare amendments, and check relevant amounts against schedules. Recalculate agreed covenant measures using reviewed inputs and definitions. Flag missing agreements and interpretation questions for the auditor to assess accounting and disclosure implications.

What to measure: Agreements reviewed; accurately extracted terms; amendments missed; calculation differences; terms with source references; review preparation time.

32 Financial statement checks

■ Cost workflow

What starts it: A draft financial statement package or revised workpaper balance is available.

What it does: Tie statements and note amounts to reviewed balances and schedules. Recalculate totals and check cross-references. Compare disclosures with the firm-approved checklist for the applicable reporting framework. Flag missing items and inconsistencies for the reviewer, then recheck revisions.

What to measure: Statement packages checked; tie-out differences; inconsistencies missed; checklist items checked; checking time; corrections after review.

33 Audit adjustment tracking

■ Cost workflow

What starts it: An adjustment is proposed, revised, approved, or reported as posted.

What it does: Connect each adjustment with its support, reviewer decision, and management response. Check agreed adjustments against posting records and final workpaper balances. Flag unposted, duplicate, or changed items and show the engagement team which differences remain unresolved.

What to measure: Adjustments reconciled; posting discrepancies; duplicates; status changes without support; reconciliation time; unresolved items.

34 Audit review note follow-up

■ Cost workflow

What starts it: A reviewer raises a note or supporting work is revised.

What it does: Connect each note to its procedure and workpaper version. Gather support, assign follow-up, and prepare a proposed resolution showing the changes made. Identify other work affected by those changes and return the findings to the reviewer for recorded clearance.

What to measure: Review notes cleared; time notes remain open; repeated review cycles; reopened notes; affected work missed; clearance time.

35 Audit completion checks

■ Cost workflow

What starts it: An engagement approaches report release or final file assembly.

What it does: Check the firm-approved completion list, outstanding procedures, subsequent-events work, representations, and required reviews. Flag missing evidence or conflicting versions and prepare the records needed for release. Track authorized release and file assembly, keeping the required review and change history.

What to measure: Completion reviews prepared; late issues; missing evidence; version errors; file assembly time; work reopened.

Coordination and firm management

Help managers investigate delays, coordinate work, and understand engagement costs.

36 Tax and audit handoffs

■ Cost workflow

What starts it: An approved adjustment or client change affects both practices.

What it does: Identify the affected engagements, compare recorded versions, and prepare an authorized handoff with supporting evidence. Track each team's review and updates. Flag conflicts and check that agreed facts reconcile, while each team keeps its own conclusions and approvals.

What to measure: Handoffs completed; missed handoffs; conflicting versions; duplicated work; reconciliation time; follow-ups completed.

37 Workload and delay investigation

■ Cost workflow

What starts it: An engagement stalls or a busy-season capacity review is due.

What it does: Investigate why returns are stuck or audit work is waiting for review. Check work status, document readiness, deadlines, and staff availability to distinguish missing information from work waiting on another step or a need for specialist skills. Give managers options with supporting records and track the assignments they approve.

What to measure: Delay investigations completed; time work remains stalled; forecast accuracy; time in review queues; missed internal milestones; agreed actions completed.

38 Scope and billing review

■ Cost workflow

What starts it: An engagement takes more effort than expected or a billing review begins.

What it does: Investigate why an engagement took more time than expected. Compare agreed scope, time records, write-downs, deliverables, and review history. Trace extra effort to added work, late information, corrections, or changed assumptions. Give partners supported findings for decisions on process improvements, billing, or revised scope.

What to measure: Billing reviews delivered; unexplained overruns; investigation time; billing corrections; rework trends; follow-up on approved scope changes.

39 Firm procedure assistant

■ Cost workflow

What starts it: A staff member asks how to complete an internal procedure.

What it does: Explain the current approved procedure, linking to written guidance or a relevant video walkthrough, such as a Loom or Teams recording. Create the checklist or task and follow engagement access rules. Refer technical questions to the appropriate specialist and send outdated or conflicting guidance to the person responsible.

What to measure: Questions answered; accurate answers; current sources; completion time; unnecessary referrals to specialists; outdated procedures corrected.

40 Firm performance and priorities

□ Data foundation

What starts it: A weekly management review is due or an operating measure changes unexpectedly.

What it does: Investigate questions such as which review queues are delaying completion or why collections have slowed. Reconcile engagement, workload, filing, billing, and collection figures. Deliver a recurring brief and dashboard with sources, update dates, and proposed next steps. Flag gaps or uncertainty, assign follow-up, and revisit decisions and outcomes at the next review.

What to measure: Reports delivered; complete and accurate data; preparation time; agreed actions completed; turnaround and realization trends.

Testing before launch and as the service changes

We agree on what a good result looks like and test each workflow with examples that reflect your firm's work. We check that it uses the right records and follows the required steps, then compare its results with answers your team has reviewed. We also agree on which actions it may take and when it must stop for review. The workflow checks its results every time it runs.

These examples show what we would test with your team. We agree on acceptable results for each workflow and check serious mistakes separately, even when most results are correct.

Tax source documents

Example to test: A prior-year K-1, corrected form, duplicate statement, or unreadable page.

What should happen: Select the right entity, period, and version. Avoid duplicate amounts and leave unresolved fields open for review.

What to measure: Accurate values; corrections missed; wrong records used; incomplete work marked complete.

Tax discrepancy review

Example to test: A return difference has missing support or conflicting explanations.

What should happen: Find the relevant records, separate supported facts from assumptions, and state the question that still needs an answer.

What to measure: Problems missed; unnecessary alerts; valid source links; agreement with reviewers.

Audit data and matching

Example to test: A ledger export omits a period or an invoice only partly matches a selected item.

What should happen: Find the gap, keep the selected population intact, and show missing or contradictory support.

What to measure: Missing records found; unsupported matches; correct reconciliation.

Completion and approval

Example to test: A return is rejected or a review note has a reply but no reviewer clearance.

What should happen: Keep the item open, record its actual status, and assign the next step to someone authorized to handle it.

What to measure: Items closed too soon; missing approvals; correct assignments; time unresolved.

Access and interrupted work

Example to test: A document belongs to another client, contains misleading instructions, or an update stops partway through.

What should happen: Follow access rules and use document text as information, not permission to act. Resume without duplicate records or marking unfinished work as complete.

What to measure: Improper access or actions; duplicate records; results after an interruption.

What the quality report shows

Reports show how many examples we checked, how many passed, and what needed staff review or correction. We explain failures and check both missed problems and unnecessary alerts. We test the software itself, the AI answers, and the results of live work. When the AI, its instructions, a connected system, or the workflow changes, we repeat the relevant tests. Problems found during use become examples for future testing.

Choosing and managing the right automation

We help your firm decide what is worth automating, choose suitable tools, and put them to work. The portfolio can grow as your team identifies recurring problems or useful features in the software you use.

Choosing the first workflow

We start with two or three tasks that regularly hold up work. We ask how often they occur, how long they take, what goes wrong, and how much review they need. Together, we choose a result worth improving, such as having documents ready for preparation or resolving review questions sooner. We compare the expected benefit with software, setup, staff review, and ongoing costs, then agree on a small pilot and what it must achieve.

Working with your existing systems

We first check what your current software can do, then consider specialist products or custom automation where needed. Connections can include tax software, audit workpapers, practice management, client portals, document storage, accounting systems, and communications. We confirm access, licensing, and supported ways to exchange information before promising a connection. AI can help interpret information or investigate discrepancies where that improves the work.

Deciding what information each tool can use

Before connecting client information, we agree on which records and engagements each person and tool may access. We check how providers may use the information, how long they keep it, and which other services receive it. When tax and audit teams share records, each keeps its own access rules and review decisions.

We set up audit workflows for the standards, reporting framework, and methods your firm uses. A document used for tax work still needs the auditor's assessment before it can serve as audit evidence. Each workflow records its actions, problems, and review decisions.

Deciding what needs your approval

We can bring drafts, open questions, and supporting records into a shared review queue or your firm's existing review process. Staff can check sources, edit drafts, approve an item, or return it for correction. The workflow records who approved it and preserves each tax and audit team's access and review responsibilities. Internal steps approved in advance can run automatically once their checks pass. Client messages go to your designated reviewer before sending. Your professionals decide tax positions, audit risks and materiality, whether evidence is sufficient, and when a return may be filed or an audit report released.

Keeping the service useful

We review results and requests for improvements with your team and check for software changes that could affect the service. We agree on priorities and test changes before release. Before adding work, we check the scope, connected systems, service commitments, and time available to build. If the work would change the fee, we agree on that first. When we add a vendor example to the portfolio, we record what was implemented, its status, and the results observed. For engagements under PCAOB standards, AS 1105 addresses evidence quality and AS 2310 addresses auditor control of confirmations. Other engagements follow their applicable standards.

How we report value

Your report shows what the automation completed, how well it worked, and what needs attention. Ongoing custom engagements receive weekly reports, or monthly if you prefer. When an engagement uses an existing SubAI automation without a custom build, reports are monthly by default, with weekly available on request.

Choosing useful measures

The "What to measure" column gives examples. We choose a few that fit the work, such as documents correctly filed, workpapers accepted, or review questions resolved. We review whether the combined results justify the fee for the work we manage. Every workflow can contribute without needing its own dollar estimate. The cost, revenue, and data labels describe each opportunity's main value; an engagement can combine them.

Showing what was completed

Reports count completed work, such as documents filed, filing packages checked, or review questions resolved. Repeat attempts, failures, incomplete work, and items awaiting review appear separately where relevant. A report also distinguishes work delivered from work your team has accepted. Automation that works in the background is counted through successful results, even when nobody opens an app.

We include relevant quality checks, explain significant problems, and show what we are doing about them. For work that happens infrequently, we can report by engagement, quarter, or season alongside the current period. Completion times appear when they help you judge the service.

Estimating time saved and its value

Where we have an agreed starting point, we compare the staff time the work used to take with the handling, review, and corrections still needed. We apply that difference to the matching work completed and use your agreed hourly staff cost, including benefits and other employment costs, to estimate its value. Reports show the assumptions and calculation. We report confirmed reductions in spending and revenue results separately from the value of staff time freed up. Revenue estimates identify what we can and cannot attribute to the automation.

If we have not estimated the time or cost for a workflow, we report its use and results without assigning a dollar figure. Time saved means staff effort avoided; the time software spends running is a different measure. We update estimates when the work changes significantly and avoid counting the same benefit twice.

Adding work as the relationship grows

At the start, we establish whether the work justifies the engagement. Once it is underway, you can approve a list of priorities and let us work through it. Each addition needs a clear purpose and quality checks. We can reuse a suitable time and cost estimate, or report useful work without one. We need supporting figures for a new savings estimate, but you do not need to reassess staff time and costs for every workflow we add.

Adding a measure does not automatically add a fee. If a request would expand the scope or change the fee, we agree on that before work starts. Each report closes with improvements made, issues needing attention, and the next priority. Continued use and reliable results can support the relationship without a dollar figure for every workflow.