RPA & AI Cheat Sheet for Accounting & Advisory Firms

Your no-fluff guide to smarter systems, better workflows, and reclaiming your team's time.

If you're an accountant, bookkeeper, or adviser still stuck in repetitive admin loops, it's time to break free. Artificial Intelligence (AI) and Robotic Process Automation (RPA) aren't just for tech startups - they're the secret weapon helping firms like ours eliminate over 2,000 hours of low-value work every year. And no, you don't need a coding background. You just need the right mindset, systems, and support. Automation isn't about replacing people. It's about removing friction so your people can do more of what they're great at.

What is RPA?

RPA (Robotic Process Automation) uses software bots to do repetitive, rule-based tasks.

Think: copy-pasting, uploading, moving files, sending emails, syncing data between platforms.

These bots run silently in the background - without error, fatigue, or distraction - freeing your team for high-value, client-facing work.

What You Can Expect to Gain

After implementing RPA & AI firm-wide, we've experienced:

- 2,000+ hours saved per year
- 22.2% drop in admin wages
- Faster onboarding & fewer client touchpoints
- 15% revenue growth—without increasing headcount
- Empowered staff building their own automations

Where to Start: High-Impact Areas to Automate

BAS & IAS Prep & Signing
Automate workpaper population, file movement, and checklist reminders. The bot queries FYI, extracts the IAS, and initiates preparation for electronic signing via Annature.

Data Collection
Use Power Automate to efficiently gather documents from various sources (Xero, XPM, FYI, ATO) and input them into workpapers—saving time by consolidating information.

CRM & Onboarding
Bots auto-populate fields, generate engagement documents, and push client data into platforms like Xero, Xplan, or FYI Docs.

Meeting Notes to Systems
Transcribe Teams or Zoom calls, then use ChatGPT + Power Automate to summarise and upload notes to Xplan or DASH.

Internal Task Allocation
Create triggers that generate jobs or tasks in practice management tools when new data arrives.

XPM Budget, Time, and Staff Allocation
Monthly recurring jobs (e.g., from Practice Ignition) deploy on the 1st of each month with annual jobs added as signed. The bot updates XPM with naming standards, proposal number, and budget/time/staff allocations.

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Accounting & Taxation | Financial Planning | Mortgage Broking
CFO Services | Business Advisory | SMSF Specialists

xero PLATINUM PARTNER

Level 1, 328 Main Street Mornington Vic, 3931
T 03 5911 7000
reception@smartbusinesssolutions.com.au
www.smartbusinesssolutions.com.au

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Get Your House In Order

If your firm isn't systematic, your automation won't stick. The #1 barrier we see in failed RPA attempts? Poor systems. Before you build a single bot, your team needs clear processes, well-documented workflows, and defined ownership.

At Smart Business Solutions, we've used SystemHUB for nearly a decade to document processes, delegate confidently, and systemise our growth.

Tools we use to support systems + automation:

- SystemHUB – SOPs & business systems
- Xero Workpapers
- FYI Docs – automated file management
- Microsoft Power Automate – no-code bot builder
- Practice Protect – secure cloud access & role-based controls

Cybersecurity & Automation

Before you start automating anything - secure everything. RPA bots work fast, but if they're connected to the wrong systems or credentials aren't locked down, mistakes can happen at scale.

Here's how we've approached cybersecurity at Smart Business Solutions while embedding automation into our firm:

Use role-based access controls: Only give automation tools access to the data and files they need. Avoid blanket admin rights.

Implement 2FA (two-factor authentication) across every platform your bots and team interact with - especially email, CRM, and financial data systems.

Test all bots in a safe environment first: Before giving a bot access to client data or sending anything externally, run it in a test scenario to validate behaviour and logic.

Keep an audit trail: Whether you're using Power Automate or another tool, document your bots, triggers, and logic flows. This helps with compliance and debugging.

Use a dedicated cybersecurity platform: We use Practice Protect to manage user access, enforce password policies, and enable secure cloud-based workflows across the entire business.

DIY RPA Tech Stack

Start simple. Build smart. Scale when ready. You don't need an enterprise budget to get started with automation. Many of the tools we used in the early stages of our RPA journey were either free, low cost, or already part of our existing Microsoft ecosystem.

Here's the core tech stack we recommend for firms who want to DIY their way into RPA. These tools are powerful, accessible, and budget-friendly - perfect for firms just getting started:

Microsoft Power Automate (Free/Low-Cost)
Automate workflows between Microsoft 365 apps like Outlook, Teams, Excel, SharePoint, and OneDrive. Included in many Microsoft 365 subscriptions.

UiPath Community Edition (Free)
A powerful RPA tool with drag-and-drop automation builder. Great for firms who want more flexibility or non-Microsoft automation.

ChatGPT (Free & Plus plans)
Use AI to draft emails, summarise notes, generate logic for bots, or even write VBA scripts. Game-changing when paired with Excel and automation tools.

Microsoft Excel (Already in your toolkit)
More than just spreadsheets -Excel is a powerful platform for RPA triggers and data processing when combined with Power Automate or VBA.

PRO TIP: Even one or two bots built with Power Automate and Excel can save your team dozens of hours a month. Don't wait for the perfect stack - start with what you already have.

Want to shortcut your own learning curve?

Here are some of the RPA and AI champions that we have learned a lot from:

SkyBots Singapore: Hands-on RPA training. Join one of our upcoming SkyBots workshops in Perth, Brisbane, Sydney, or Melbourne. Workshop details here: https://www.smartbusinesssolutions.com.au/events/

Systemology & SystemHUB: Learn how to document, delegate, automate and scale without chaos.

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