

# ChatGPT & Claude Prompts for Accountants & Bookkeepers

A practical starter library of AI prompts for client comms, advisory, chasing, and practice admin

## Direct answer: what can an accounting or bookkeeping firm use ChatGPT or Claude for?

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You can use them to draft client emails, explain reports and figures in plain English, chase overdue invoices and missing records, turn numbers *you* provide into advisory talking points, and write proposals, engagement letters, and onboarding checklists. They are a drafting and explaining tool, not a source of truth: a qualified person checks any numbers or advice before it leaves the practice, and identifiable client financial data is never pasted into public AI tools.

### 1. Client communication & explaining reports

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These prompts help you translate what you already know into clear client-facing writing. You supply the figures; the AI supplies the plain-English wrapper.

#### Explain a report in plain English

You are helping me write to a client who is not financially trained. Explain the following figures from their Xero or MYOB file in plain English, in a warm, professional tone: [figures]. Cover what each number means for their business and flag anything worth a conversation. Do not give tax or investment advice.

#### Summarise the month for a client

Draft a short monthly update email to [client name] for the period [period]. Use these figures I am providing: [figures]. Keep it to four or five sentences, highlight one thing that improved and one thing to watch, and end with an offer to talk it through.

#### Answer a client question clearly

A client asked: "[paste their question]". Draft a clear, plain-English reply based only on the facts I give you here: [figures]. If answering properly needs information I have not provided, list what you would need rather than guessing.

#### Rewrite jargon for a non-accountant

Rewrite this paragraph so a busy small-business owner understands it on first read, without losing accuracy: "[paste your draft]". Keep it professional, avoid jargon, and keep it under [word count] words.

## 2. Chasing overdue invoices & missing records

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Firm, polite chasing at scale is one of the most repetitive jobs in a practice. These prompts keep the tone right while you fill in the specifics.

### First reminder — overdue invoice

Draft a friendly first reminder to [client name] about invoice [invoice number] for [amount], which was due on [due date]. Keep it warm and assume it was an oversight. Make it easy to pay and offer to resend the invoice if needed.

### Firmer follow-up

Write a firmer but still professional follow-up to [client name] about invoice [invoice number] for [amount], now [X weeks] overdue and previously reminded once. State the next step clearly, keep the relationship intact, and invite them to reply if there is a problem.

### Chase missing records before the BAS lodgement

Draft an email to [client name] requesting the missing records I need to complete their work for [period]. The outstanding items are: [list]. Explain briefly why each is needed, give a clear due date, and keep the tone helpful rather than nagging.

### Set up a reusable reminder sequence

Write three short reminder emails I can reuse for overdue invoices: a gentle nudge at [X days] overdue, a firmer note, and a final notice. Use placeholders like [client name], [invoice number], and [amount] so I can drop in details each time.

## 3. Advisory & meeting prep

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Advisory conversations are where the value is. Use these to turn figures you have already reviewed into a structured discussion — the AI organises, it does not decide.

### Talking points from the numbers

I am meeting [client name] to discuss their results for [period]. Based only on these figures: [figures], give me five advisory talking points, each with a plain-English observation and a question I could ask them. Do not invent numbers or trends I have not provided.

### Prep an agenda

Draft a one-page agenda for a [period] review meeting with [client name]. Structure it as: performance, cash flow, upcoming obligations, and one improvement idea. I will provide the figures under each heading – leave clear placeholders where my numbers go.

#### **Frame the cash-flow story**

Help me explain a cash-flow issue to [client name] without alarming them. Here is the situation and the figures: [figures]. Draft how I would describe what is happening, why it matters, and two practical options to discuss. Keep it factual and non-prescriptive.

#### **Anticipate client questions**

Before my meeting with [client name] about [period], list the ten questions a business owner is most likely to ask about these results: [figures]. For each, note what I should have ready to answer well.

### **4. Proposals, engagement letters & onboarding**

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First-draft the paperwork, then review and localise it. Every one of these outputs needs a human check before it goes to a client.

#### **Draft a proposal**

Draft a proposal for [client name], a [industry] business, for the following services: [list]. Include scope, what is and is not included, and how we work together. Leave pricing as a placeholder [amount]. Professional, warm, and easy to skim.

#### **Outline an engagement letter**

Draft a plain-English engagement letter outline for [client name] covering scope, responsibilities of each party, fees [amount], and how either side can end the engagement. This is a first draft for me to review and adapt – flag anything I should have a professional check against the applicable accounting standards.

#### **Build a new-client onboarding checklist**

Create an onboarding checklist for a new [industry] client moving to our practice on Xero or MYOB. Include the documents to request, access to set up, and the first three touchpoints in their first month. Format it as a checklist I can reuse.

### **Draft a welcome email**

Write a warm welcome email for a new client, [client name], starting with our practice for [services]. Set expectations for the first month, list what we need from them, and reassure them the transition will be smooth.

## **5. Practice admin & marketing**

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The background work that keeps a practice running and visible — drafts you can produce in minutes and refine.

### **Write a client-facing deadline reminder**

Draft a general reminder email to clients about the upcoming [period] deadline for BAS/ATO deadlines. Keep it clear and calm, tell them what we need and by when, and use [client name] as a placeholder for the merge field.

### **Draft a newsletter section**

Write a short, friendly newsletter section for small-business clients about [topic]. Keep it practical, avoid jargon, under [word count] words, and end with an invitation to get in touch with the practice.

### **Draft an internal process note**

Turn these rough notes into a clear internal process document for my team: "[paste notes]". Structure it as purpose, steps, and who is responsible. Keep it concise enough to actually be followed.

### **Repurpose an FAQ answer**

Turn this answer I often give clients into three formats: a short website FAQ entry, a social post, and a paragraph I can paste into an email. Original answer: "[paste answer]". Keep the meaning accurate.

### **Before you send: two non-negotiables**

Do not paste identifiable client financial data — names tied to figures, tax file numbers, bank details — into public AI tools; strip or anonymise first and respect the Privacy Act. And a qualified person reviews any numbers or advice the AI helped produce before it goes to a client. The prompt gives you a draft, not a decision.

## When prompting isn't enough

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Everything above is manual: you open a chat window, paste the context, copy the result back, and do it again for the next client. That is a real gain when it is occasional. But most of these jobs — chasing overdue accounts, explaining the month, prepping the same review, reminding clients before BAS season — are the same workflow repeated across your entire client book, week after week.

At that point, copy-paste prompting is the bottleneck. The next step is to have that chase, explain, or prep run automatically inside the systems you already use — your Xero or MYOB data, your email, your practice tools — with your sign-off on anything that goes to a client. That is the difference between using AI and having AI built into how the practice runs.

That is what SG1 does: we take the repetitive, whole-of-book workflows and wire them into your existing environment with a human approval step, so the work happens without a person driving each prompt by hand. The prompts in this guide are a genuinely useful place to start — talk to us when you want the workflow itself automated rather than run one client at a time.