PRO-AI-AGENT

TO GROW YOUR BUSINESS WITH INTELLIGENT SOLUTIONS | IT & AI SERVICES

AI agent deployment action plan

Accounting & Professional Firms

Accounting, tax, legal and advisory firms: the AI agent collects documents, answers clients and prepares files so your experts can focus on advice.

The challenges we address

- Chasing client documents
- Workload peaks during tax season
- Manual data entry and filing

Overview

1	**Days 1-30**	**Foundations & quick wins**	Complete files 2x faster
2	**Days 31-60**	**Core business automations**	30 to 40% less manual data entry
3	**Days 61-90**	**Integrations & optimization**	Capacity to onboard more clients
4	**Months 4-6**	**Scale & intelligence**	Tax season handled without excessive overtime
5	**Months 7-12**	**Autonomy & growth**	A firm focused on advice rather than data entry

1

DAYS 1-30

Foundations & quick wins

Goal : Set up a secure infrastructure, connect the agent to your messaging tools, train your team and deliver the first high-impact automations.

⚙ Common foundation

- **Kick-off workshop & process audit** — Mapping of your repetitive tasks, identification of quick wins and prioritization with your PRO-AI-AGENT project manager.
- **Dedicated VPS creation, deployment & configuration** — Private server sizing, hosting region selection, domain name, automatic backups and monitoring. Your data stays yours.
- **Ubuntu system security hardening** — Non-root user, key-only SSH access, firewall, brute-force attack protection, automatic security updates and log monitoring.
- **AI agent harness installation & configuration** — Setup of the agent's runtime environment, skills, permissions and action logging.
- **Connection to the LLM of your choice** — OpenAI, Anthropic, Google Gemini, Alibaba (Qwen) or lower-cost Chinese LLMs: secured API keys, spending caps and a fallback model.
- **Agent connection to your messaging apps** — Telegram, WhatsApp, Signal, email or others: you talk to your agent like a colleague, right from your phone.
- **Agent memory setup** — Specialized or open-source tools depending on your budget and the project manager's recommendations: long-term memory, company knowledge base, documents and procedures.
- **Team training** — Getting started with the tools, how to phrase a request, delegate a task, approve an action, plus security best practices to start automating daily work.

📊 Industry automations

- **Document collection via messaging** — Clients send invoices and statements via WhatsApp or email, filed automatically.
- **Appointment booking & client FAQ** — Deadlines, fees, required documents and appointments.
- **Personalized checklists** — List of missing documents sent to each client.

🎯 **Target outcome :** Complete files 2x faster

2

DAYS 31-60

Core business automations

Goal : Automate the most time-consuming daily processes of your business and anchor new habits within the team.

⚙ Common foundation

- **Bi-weekly performance review** — Conversation analysis, instruction tuning and enrichment of the agent's memory.
- **Advanced training** — The team learns to create routines and scheduled tasks on its own, no technical skills needed.
- **LLM cost tracking** — Usage report and budget alerts to keep spending under control.

📊 Industry automations

- **Document extraction & pre-entry** — Reading invoices and receipts, categorizing expenses.
- **Automatic pre-deadline reminders** — Tax reminders and missing documents.
- **Fee invoicing** — Automated invoices and payment reminders.
- **Knowledge base search** — Quick answers on internal procedures and regulations.

🎯 **Target outcome :** 30 to 40% less manual data entry

3

DAYS 61-90

Integrations & optimization

Goal : Connect the agent to your business software, make end-to-end workflows reliable and measure the first return on investment.

⚙ Common foundation

- **Quarterly security audit** — System patches, API key rotation, backup restore test.
- **Model selection optimization** — Smart routing between premium and low-cost models depending on each task's complexity.
- **90-day ROI review** — Hours saved, revenue generated and priorities for the next semester.

📊 Industry automations

- **Accounting software integration** — Connection with your accounting and tax tools.
- **Assisted bank reconciliation** — Discrepancy detection and matching suggestions.
- **Monthly client summaries** — Financial dashboards sent automatically.

🎯 **Target outcome :** Capacity to onboard more clients

4

MONTHS 4-6

Scale & intelligence

Goal : Move from task automation to intelligent management: specialized agents, forecasting, dashboards and compliance.

⚙ Common foundation

- **Multi-agent architecture** — Specialized agents (sales, operations, admin) coordinated by a main agent.
- **Compliance & data protection** — Data policy review (Quebec Law 25, PIPEDA, GDPR depending on your market), access logs and consents.
- **Power-user training** — Your internal champions become autonomous in evolving the automations.

📊 Industry automations

- **Tax season preparation** — Automated collection and tracking campaign for returns.
- **Anomaly detection** — Alerts on unusual expenses and risks.
- **New client onboarding** — Engagement letter, KYC and initial collection automated.

🎯 **Target outcome :** Tax season handled without excessive overtime

5

MONTHS 7-12

Autonomy & growth

Goal : Turn AI into a lasting growth lever: new revenue streams, replicating the model and a year-2 roadmap.

⚙ Common foundation

- **Annual ROI & KPI review** — Full measurement of time savings, revenue and service quality over 12 months.
- **Full security audit & upgrade** — Infrastructure review, server and model upgrades to the latest generations.
- **Year-2 roadmap** — New automations, new channels and growth targets defined with your project manager.

📊 Industry automations

- **Proactive advisory** — Identifying tax opportunities and risks for each client.
- **Conversational client portal** — Clients query their file 24/7.
- **Year-2 roadmap** — New value-added advisory services.

🎯 **Target outcome :** A firm focused on advice rather than data entry

Ready to launch your action plan?

Get a personalized plan and a free quote within 24 hours.

✉ contacts@pro-ai-agent.com · ☎ +1 (312) 866-9095 · 🌐 pro-ai-agent.com/en/plan-action/comptabilite

Samir EL-HABIB KAHLOUL — Montréal, Québec, Canada

Target outcomes are indicative goals; they are adjusted during the initial audit according to your situation. The plan is customized by your PRO-AI-AGENT project manager.