Is your firm ready for AI?

Twenty quick checks. Tick what's true today. It takes five minutes, and it shows where to start and what to fix before anyone puts client data into an AI tool.

1. Data and confidentiality

- [ ] We know which AI tools staff use today, including free ones on phones
- [ ] Approved tools are on business plans that don't train on our inputs, and we've checked their data terms
- [ ] We've written down what client data must never go into AI
- [ ] Our engagement letters and privacy notice cover AI-assisted work
- [ ] AI use is covered in our WISP (the written security plan the IRS expects under the FTC Safeguards Rule)

2. Policy and supervision

- [ ] We have a written AI use policy (two pages is enough)
- [ ] A CPA or EA checks AI output before it reaches a client or the IRS
- [ ] We know what to do if something goes wrong, and who to tell
- [ ] Our professional liability insurer's position on AI use has been checked
- [ ] One named person owns AI in the firm, and it is in their job description

3. Where the time goes

- [ ] We know our top five repetitive jobs and roughly how long each takes outside tax season
- [ ] Organizer and document chasing is a mapped process, not left to memory
- [ ] Templates exist for common letters, including IRS notice responses
- [ ] Meeting notes and file notes follow a consistent format
- [ ] We've picked one job to automate first, with a time-saved target

4. Tools and team

- [ ] We've checked what our current software (practice management, tax software, Microsoft or Google) can already do
- [ ] Client documents live in one place, not scattered across inboxes
- [ ] Staff have had at least an hour of hands-on training, before tax season
- [ ] We review what's working every quarter
- [ ] Nobody's buying AI tools before deciding which job they'll do

Your score

Count your ticks out of 20.