



GUIDE

AI in action[✦]

Real stories, real wins from leading accounting firms.





Introduction

Top firms aren’t just talking about AI. They’re rewriting what’s possible—from proactively solving problems before crises hit to gaining revealing insights that change the conversation with clients.

Our guide spotlights Ledgerly Consulting, Hiline, and Sorren as they harness AI to streamline processes, strengthen strategy, and deliver more value to clients.

Ready to up your AI game?

See what’s working for your peers—and how to make it your edge.



01 Ledgerly Consulting

From managing transactions to shaping strategy

02 Hiline

The efficiency engine behind smarter, more competitive firms

03 Sorren

Amplifying human expertise

01 Ledgerly Consulting



Brittany Malidore
Co-Founder and Managing Partner

What’s the biggest benefit of AI?

The biggest benefit has been time and transformation. AI has allowed us to shift from managing transactions to shaping strategy. It has elevated our team’s capacity, enhanced accuracy, and given us back the creative bandwidth to serve clients with more insight and empathy.

AI didn’t just make our firm faster; it made us sharper, more intentional, and more human. The hardest part is keeping up with AI’s speed. When the tech changes, we lose control of the pace and can spend nearly 40% more time fixing, pivoting, and redoing what was working perfectly the day before. Progress isn’t always clean—but it’s always worth it.

What’s your philosophy on AI?

AI should never replace humanity; it should amplify it. We view AI as a co-strategist, not a shortcut. It’s not about working less. It’s about working smarter with more clarity, precision, and empathy—this is the mark of true strategy. It helps us bridge the gap between information overload and intentional insight.

At a glance

AI is driving major time savings and transformation—letting Ledgerly shift from managing transactions to shaping strategy.

ABOUT

Ledgerly Consulting provides full-service accounting and advisory support, helping organizations stay audit-ready, compliant, and future-focused through modern systems, automation, and intentional financial leadership.

SERVICES

Full-service accounting and advisory support including bookkeeping, payroll, tax preparation, CFO advisory, and strategic consulting.

VERTICALS

Nonprofits, SMBs

FIRM SIZE

3

CLIENTS

50-100

STARTED USING AI

2022

What processes feel “smarter” now, and which are still a work in progress?

Onboarding, bill pay, and reconciliations are worlds apart from where they were two years ago. AI has made these processes almost intuitive—recognizing vendor patterns, predicting classifications, and reducing error rates exponentially.

What’s still in progress is contextual learning for nonprofit accounting. AI is brilliant, but it doesn’t yet fully grasp the emotion and nuance behind mission-driven transactions. That’s where the human layer still matters most, interpreting what the numbers mean for real people, not just what they say.

What’s one major win and one challenge your firm has encountered with AI?

Helping a nonprofit client modernize their financial workflows by integrating AI-powered automation into their bill processing and reconciliation systems. We reduced reconciliation time by 60% and significantly improved data accuracy, allowing our team to spend less time chasing transactions and more time providing strategic insight.

A challenge for us is change management. Introducing AI required shifting mindsets from fear to curiosity and from simple automation to augmentation. We learned that people don’t resist AI; they resist uncertainty. That experience proved the power of AI as a reliable silent partner that serves to strengthen both accuracy and advisory impact.

Which BILL AI features or capabilities does your firm use most?

We rely heavily on the AI-powered invoice data extraction, smart approvals, and automated payment scheduling. It’s like having a second set of eyes that never blink. The system learns our vendor behavior, flags exceptions, and even predicts when something doesn’t look right. It is control and confidence merged beautifully.

Has BILL AI delivered a breakthrough result or solved a unique challenge for your firm?

A standout example was with a nonprofit client struggling with bill categorization and restricted fund tracking. BILL AI identified and auto-coded over 50% of recurring vendors, learning nuances in funding sources and restrictions. That shift didn’t just save time; it changed the conversation.

One of our clients even saved the equivalent of more than half of a full-time employee by implementing the AI-driven workflows. That time was reallocated toward strategic planning, fundraising efforts, and board development areas that truly advance the client’s mission.

BILL AI identified and auto-coded over 50% of recurring vendors, learning nuances in funding sources and restrictions.



How are you using AI agents?

We’re actively exploring the use of AI agents for our day-to-day work. Our focus is on how these tools can act as intelligent extensions of our team—automating repetitive tasks, summarizing client activity, and supporting our decision-making with deeper data insights. Remember, it’s about amplifying humans, not eliminating them.

How has AI changed the way you deliver services?

AI has elevated our firm from being reactive processors to proactive partners. It’s shifted our energy from “close the books” to “open the conversation.” Our meetings are no longer about what happened last month; they’re about what’s possible next month. Of course, it required training and new muscles. We taught our team to challenge AI outputs, bring intuition to data, and stay curious.

What new services or client approaches has AI made possible?

AI is paving the way for more interpretive services: financial storytelling, predictive advisory, and scenario planning. We’re developing client dashboards that speak plain language where AI summarizes trends and suggests actionable insights.

The future is one where AI narrates the data and humans deliver the empathy behind it. That’s the blend we’re building: automation meets authenticity.

What excites you most about AI's potential?

I’m most excited for AI to become invisible—when it’s so seamlessly integrated that it just feels like intuition at scale. I see a world where accounting firms operate with living, learning ecosystems that think, adapt, and collaborate with us. We’ll move beyond efficiency into empathy, where AI surfaces not just numbers, but stories that move people to action.

What advice do you have for other firms?

Start small but think big, and never forget that AI reflects the mindset of the people behind it. Lead with vision, not fear. Be transparent with your team, celebrate curiosity, and remember that you’re not just building smarter systems; you’re building a smarter culture.

AI has elevated our firm from being reactive processors to proactive partners. It’s shifted our energy from “close the books” to “open the conversation.”

02 Hiline



Eric Cohen, CPA
Head of Technology

At a glance

AI isn't replacing accountants—but it is replacing the ones who don't use it. It's the efficiency engine behind smarter, more competitive firms.

ABOUT

Hiline's mission is to transform how clients manage their businesses. Many founders struggle with poor financial management—the leading cause of business failure. Hiline is modernizing financial services, creating something dynamic and beneficial at the core of US business health.

SERVICES

Advisory, compliance, tax

VERTICALS

Nonprofits, SMBs

FIRM SIZE

50

CLIENTS

300

STARTED USING AI

As soon as it came out

What's the biggest benefit of AI?

Efficiency, hands down. AI gets us there faster. We're experiencing about a 40% increase in efficiency broadly.

What's your philosophy on AI?

We definitely see great value using AI, but we don't think it's going to replace all accountants—just those who don't use it. Not using AI is like insisting on paper ledgers when everyone else is optimizing with Excel. AI is the new standard, and it's not about being replaced, but being left behind if you don't adapt.

What processes feel “smarter” now and which are still a work in progress?

Complex tasks like building Excel formulas and writing code are faster and more precise with AI. Instead of spending hours on manual builds, ChatGPT—with just the right prompt—solves the problem in a fraction of the time and often delivers a better method than originally imagined. The ability to upload screenshots for instant analysis and suggestion is reshaping how we approach daily challenges.

Still, AI isn't perfect. Hallucination remains an issue, so every output must be proofed by the humans who have the expertise. The real work is creating reliable frameworks: What are best practices for prompting? What safeguards ensure consistent, trustworthy results? The more robust the framework, the faster AI trust will grow.

What’s one major win and one challenge your firm has encountered with AI?

Hiline’s major win comes in the form of accumulated small victories. Each minor improvement builds up to something genuinely transformative. From reducing repetitive manual work to improving error detection, AI steps in as an effective silent partner.

An AI challenge continues to be managing expectations and maintaining vigilance against AI’s limitations, including occasional hallucinations and inconsistent outputs. One key lesson has been that AI works best when treated as an assistant—one that needs clear instructions, regular feedback, and oversight. It’s not a set-and-forget tool, but an evolving collaborator.

Which BILL AI features or capabilities does your firm use most?

We’re currently working with the BILL W-9 Agent, a solution designed to automate the tedious process of chasing down W-9 forms. By automating outreach, follow-up, and validation, it eases a historically manual process and big pain point—while freeing staff to work on higher-value activities. The agent is equipped with feedback loops and safeguards, ensuring human oversight at critical steps.

Has BILL AI delivered a breakthrough result or solved a unique challenge for your firm?

The BILL W-9 Agent automates vendor outreach and document collection, monitors for incomplete or incorrect returns, and resends requests. Then, once the correct form is received, it digests and updates all necessary systems. The difference is felt most at year-end when chaos and fire drills around W-9s are replaced by proactive, seamless resolution. Critical payment decisions are now informed by real-time data, and staff enjoy the peace of mind from problems solved before crises hit.

How are you using AI agents?

We have built our own AI agents and are in beta testing in our native apps as well. We view it like hiring an associate: You train the agent on how the work is to be processed, set guardrails in place, provide feedback and insight along the way, and eventually let it do its thing.

How has AI changed the way you deliver services?

AI is redefining bookkeeping from a task to an outcome, removing the routine so accountants can deliver value and strategic insight.

In terms of change management, internal adoption has followed the classic bell curve: early, eager adopters, steady mainstreamers, and latecomers who needed extra help. For some, change still felt intimidating. Visible results and hands-on guidance were essential for bringing everyone along. Successful change management now emphasizes showing the actual impact—that is, how AI makes the work better, easier, and more valuable.

AI is redefining bookkeeping from a task to an outcome, removing the routine so accountants can deliver value and strategic insight.

What new services or client approaches has AI made possible?

Hiline isn’t focused on service expansion. Instead, our commitment is to double down on core strengths, get sharper, and stay relentlessly competitive. By modernizing and streamlining what the team already excels at, AI helps elevate quality and efficiency.

What excites you most about AI's potential?

What we look forward to the most is perfecting AI agents, allowing them to take over work with minimal oversight.

Honestly, everything about AI is exciting. We’re still at the very beginning—barely scratching the surface. Perfecting AI agents so they can handle work independently, accurately, and with minimal oversight is on the horizon. The idea of a living, learning tech ecosystem alongside the human team is no longer sci-fi—it’s the next chapter.

What advice do you have for other firms?

Just try it out. Put it into daily use and test what it can do.



03 Sorren



Matthew May
National Accounting Managing Partner

At a glance

The real game-changer with AI is moving past legacy mindsets —like the billable hour—toward data-driven decisions at every level.

ABOUT

Sorren looks beyond the numbers to the story they tell about the client’s business. Whether a business is just starting out, growing rapidly, or planning for succession, Sorren adapts its approach to meet clients where they are.

SERVICES

Advisory, accounting services, tax, audit

VERTICALS

Healthcare, nonprofit, construction, real estate, tech, crypto, professional services

FIRM SIZE	CLIENTS	STARTED USING AI
1,000	10,000	2024

What’s the biggest benefit of AI?

The biggest benefit is focusing human attention where it matters most. With so much data, AI-powered anomaly detection helps concentrate our team's energy on exceptions and opportunities, preventing wasted time and delivering true value at scale for both accountants and clients. This shift is transformative—humans are supported to deliver more impact, not just more transactions.

What’s your philosophy on AI?

We handle some of the world's most sensitive data, so our philosophy is always security-first. Rather than using generic AI tools, we trust solutions from vetted tech partners—like BILL, Intuit, and Xero—who’ve proven their security with our clients’ financial information. AI is an enabler, but only with guardrails and the right partnerships, augmenting expertise and trust.

Rather than using generic AI tools, we trust solutions from vetted tech partners who’ve proven their security with our clients’ financial information.

What processes feel “smarter” and which are still a work in progress?

Our onboarding is now systematic thanks to AI-generated summaries. Every client handoff uses standardized formats, created automatically from meeting notes and videos, so teams get all key points instantly. It’s put an end to sifting through hour-long recordings.

AI’s true potential in financial analysis is evolving. Language models are stronger with text than native financial data, so the big leap will come when models interpret the numbers with real business context, not just words.

What’s one major win and one challenge your firm has encountered with AI?

Major win: Training our global team (especially those where English is a second language) with AI. AI enables real-time email translations and boosts confidence in cross-cultural communications. This small use case had an outsized impact on productivity and team unity.

Challenge: The ease of accessing new AI tools in a 1,000-person firm means shadow IT and data security risks can grow fast. Change moves quickly—sometimes too fast—demanding relentless education and consistent policy reminders to keep information protected. Change management and pace of innovation are challenges, but we meet them with transparency and training.

Which BILL AI features or capabilities does your firm use most?

Anomaly detection stands out, such as identifying out-of-the-norm payments, sudden address changes, and duplicate transactions. These features help catch issues proactively—before cash leaves the building—rather than reactively catching them after the fact in financial statements. W-9 management also gets a nod for taming a common back-office headache.

Has BILL AI delivered a breakthrough result or solved a unique challenge for your firm?

The anomaly detection capability in BILL has been a game-changer, surfacing issues—like unusual payment patterns or address changes—before client funds are at risk. This lets us intervene early, transforming problem-solving from reactive to proactive.

How are you using AI agents?

We primarily use agents built by our tech partners—BILL and QuickBooks—ensuring client data security and compliance. Internally, we've dabbled with custom agents for simple tasks like job descriptions and social media, but client-facing agents always come from trusted partners. Experimentation is encouraged, but safeguards come first.

How has AI changed the way you deliver services?

AI-supplemented platforms keep shifting the “people, process, technology” equation. As technology improves, we adapt our model—reducing manual work and deepening advisory focus. This rate of change requires ongoing training, robust partnerships with tech vendors, and an openness to iterative change management across a large, distributed team.

What new services or client approaches has AI made possible?

AI is pushing the threshold of who outsources accounting. As automation becomes more capable, companies with \$2–\$25M in revenue (not just small businesses) are outsourcing departments once thought “too big to outsource.” AI is also laying the groundwork for more scenario planning and real-time insights. The next leap will be enterprise-grade outsourcing and predictive advisory for more midmarket clients.

What excites you most about AI's potential?

The real game-changer will be shifting away from legacy mindsets—like the billable hour—toward decisions made with data at every level. When AI becomes “invisible” and just part of how things run, firms like ours can give clients better, faster, and more actionable insights to support fast, informed decisions.

What advice do you have for other firms?

Start small and use it personally before deploying it at work. Have team members use AI for planning a party or solving a simple problem at home. Let them get comfortable and curious, then gradually bring those use cases into client work. The key is to lower the fear, celebrate experimentation, and keep the conversation about practical value.



What's next?

The future of accounting is being shaped by those who see AI not as a threat, but as a catalyst for progress.

As technology continues to evolve, the real opportunity lies in harnessing AI to amplify human expertise—empowering professionals to focus on deeper insights, stronger client relationships, and bold new possibilities for their firms. By embracing innovation with curiosity and purpose, accounting leaders can chart a path toward smarter service, greater impact, and a profession that's more dynamic and rewarding than ever before.



BILL AI isn't just about automating tasks—it's about amplifying your firm's potential, freeing you to focus on what matters most.

Book a live demo or launch your free trial to kick your firm's growth into high gear.

See it in action

Already a BILL customer?
Reach out to your account manager to explore what's next.



©2025 BILL Operations, LLC. All rights reserved. BILL and the BILL Logo are trademarks belonging to BILL Operations, LLC. Other company names and brands are the property of their respective owners.

Results from using the BILL platform may vary according to each company's goals, size and other conditions specific to them.

