Let AI carry the busywork, not your clients' tax data.

A full-day, onsite working session with your partners. We find where AI is already in use at your firm, where it can lighten the load in and out of busy season, and the guardrails that protect client financial and tax information. You leave with a policy, a plan, and a working first version.

SOUND FAMILIAR?

"Busy season is coming and I can't hire enough junior staff."

"If someone uploaded a client's return to a free AI tool, we'd never know."

"Clients are starting to ask whether we use AI on their financials."

WHAT THE DAY LOOKS LIKE

01 Before the day: shadow AI review
We review a sample of your network's web (DNS) traffic to see which AI tools your team already uses. It shows the tools, never anyone's messages.

02 Morning: walk your firm front to back
We trace how engagements move, from document collection and organizers through prep, review, and client communication, and mark routine work AI can take on.

03 Midday: choose tools and set guardrails
We pick the tools you'll approve and draft the rules your professional standards and IRS safeguarding requirements call for: what goes in, what never does, and who reviews the output.

04 Afternoon: build it
We build a working first version of your top workflow on tools you approve, so you see it run before we leave.

WHAT YOU WALK AWAY WITH

- A shadow AI report: what's in use today, and what to approve, replace, or block
- A draft AI use policy built around safeguarding client data, ready for partner review
- A ranked map of where AI fits in your firm, and where it doesn't
- A working first version of one AI workflow
- A 30/60/90 day plan with owners and dates
- Questions for your broker about how your cyber and professional liability policies treat AI

WHO IT'S FOR

Managing partners and firm administrators at CPA, tax, and bookkeeping firms of 5 to 100 people. We schedule around your busy seasons, and it works best with your partners in the room for the full day.

THE WORKSHOP

$7,500

One full day onsite with your leadership team. Shadow AI review, draft policy, and a working first version included.

AFTER THE WORKSHOP

Ongoing AI governance, month to month

AI tools change every month, and a setup that works today can drift tomorrow. Our monthly governance retainer keeps yours safe and useful: we vet new tools before your team adopts them, keep your policy current, confirm a person still reviews what AI produces, and report on results each quarter.

Priced monthly and quoted after the workshop, once we know what we've built together.

Talk to us about a date at nicwerks.com

49% of small and midsize businesses have no AI-specific security policy (ConnectWise, 2025, cited by Pax8). 84% would trust an outside technology advisor to guide their AI rollout (Pax8, The Agentic Workforce Economy, June 2026).