PROMPT WORKS STUDIO

Chaos to calm, built to be yours.

Ridge Street Accounting

Workflow Audit

Prepared for Sam Ridge, Principal

Chad Maxwell · Prompt Works Studio · Toowoomba

October 2026

> **A made-up example.** Ridge Street Accounting and its people aren't real. The software, prices, rules and pay rates in it are, as read on the dates shown.

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About me and this Audit

Who I am. I'm Chad, and I help small businesses work out where AI fits. I run my own business on Claude, so I've learned firsthand what it does well and where it needs someone checking.

What this Audit is for. To show you, job by job, what AI can take off your plate, what it can do with a person checking, and what should stay with your people. It's information for you to decide with.

How I work.

- You deal with me, start to finish.
- Privacy's part of every job. Client details only go into tools you've approved.
- A person in your business checks everything AI does before it goes out.
- I'll tell you when the answer is not yet, or not AI at all.
- I'll show you the options I find, including ones that aren't mine. You choose.
- I only take on a Build that pays for itself within 12 months, counted job by job, with your time costed at the award minimum so the saving isn't overstated.
- When I report on the AI tools your people use, I name the tools and the jobs. I don't say who uses what.
- The report is yours. Take it to anyone you like.
- It's drafted with AI, and checked and signed off by me.

Summary

What I did. Half a day at your office on Tuesday 6 October. I sat with you and Priya (admin), spent 20 minutes each with Tom (accountant) and Lee (bookkeeper), and looked at five jobs that eat the most time.

Your data and who checks. Client details only go into tools the firm has approved under its AI use policy (section 9). Every piece of AI work is checked by a named person in the firm before it goes to a client, and the check is recorded.

What I found.

- **About 25.5 hours a week go on the five jobs I looked at.**
- **AI is already in use, but not in a way you'd want a client to see.** Client emails are being drafted in a free AI tool on a personal phone.
- **You don't yet have the basics the Tax Practitioners Board and CPA Australia expect** for AI use: a written policy, client permission, and a record of how AI work gets checked.
- **Tax figures and advice stay with you.** Nothing in this report hands those to AI.
- **Your mail and accounts have 7 gaps** (the page before section 10).

Fix now (section 7). Stop client details going into the free tool. Put a written AI use policy in place. Get client permission before their details go into any AI tool.

Your options (section 8). For jobs 1 to 4, I've set out what you could do, what each costs and how many hours it gives back. Some cost nothing. None of them involve me.

What I can do for you (section 10). Job 2, chasing, built in Claude pays for itself within 12 months at the better end of my estimates (10.5 months, $3,400). With setting Claude up and the free fixes for jobs 1, 3 and 4, that's $5,929 to start, saving $461 to $697 a month, and it pays back in 8.5 to 12.9 months. It saves more each month than the options without me, but it's about five years before it catches up with them. Jobs 1, 3 and 4 don't pass yet, so I wouldn't take those on. Job 1 is close. The choice is yours.

1. The firm today

People	4: Sam (principal, registered tax agent), Tom (accountant), Lee (bookkeeper), Priya (admin)
Clients	About 350 individuals and 60 small businesses, mostly in and around Toowoomba
Software	Xero, Xero Practice Manager, Outlook and Microsoft 365, a document portal, Adobe Acrobat
Busy season	July to October; hours on jobs 2 and 5 roughly double

Sam's goal for the Audit, in Sam's words: "Get the admin off Priya's plate so she can help with the returns."

2. AI already in use

Sam agreed I could talk to each staff member on their own. As agreed, this section names tools and jobs. It doesn't say who uses what.

Tool	Paid for by the firm?	Used for	Client details going in?
ChatGPT, free version, on a personal phone	No	Drafting reminder emails to clients	Yes: names and what's missing from their file
Microsoft Copilot, built into Microsoft 365	Included in the licence	Summarising long email threads	Sometimes
AI features in Xero	Included	Suggesting how transactions are coded	Yes, inside Xero

Nobody was doing anything they thought was wrong. The free tool was just the easiest thing to hand. But the free version isn't set up for client information, and the firm doesn't know what's been put into it.

The AI built into Xero and Microsoft 365 counts too. The National AI Centre suggests listing it alongside anything you add yourself (see section 3).

3. What the guidance says, and what I saw

This section sets out what the professional and government bodies have published about AI, next to what I saw on the day. **It isn't legal or tax advice.** For what it means for your practice, talk to your own adviser or professional body.

Guidance	What it asks for, in short	What I saw
Tax Practitioners Board, TPB(GS) 55/2026, 22 July 2026	Client permission before their information goes into an AI tool, depending on how the tool's set up. Check the tool keeps data secure. Check AI output and record how you checked it. Supervise staff.	No client permission in place. Client details going into a free tool. No record of checking.
CPA Australia, InPractice, 25 August 2025	No client data in public AI tools. Say in engagement letters how AI is used. A person checks all AI work. A firm AI policy.	Engagement letters don't mention AI. No policy.
OAIC (privacy regulator), guidance on commercially available AI products, 21 October 2024, updated 17 January 2025	Look into a tool before choosing it. No personal or sensitive information in public AI tools. Update your privacy policy to cover AI.	Privacy policy doesn't mention AI.
AUSTRAC, new industries and services to be regulated, from 1 July 2026	Accountants who provide certain designated services are now reporting entities under the AML/CTF Act. A reporting entity is covered by the Privacy Act, so a small firm may now be covered for that work, whatever its turnover.	The firm does some company set-ups. AUSTRAC's guidance says drafting or reviewing the papers to create a company is regulated (item 6 of table 6), so the AML/CTF rules may apply to that work. Check with your adviser.

Guidance	What it asks for, in short	What I saw
OAIC, automated decisions in privacy policies, from 10 December 2026	A business under the Privacy Act that uses personal information in automated decisions that could affect someone's rights or interests must say so in its privacy policy.	Nothing in this report feeds a decision about a person. Worth knowing before any option that would.
National AI Centre, Guidance for AI adoption: foundations, first published October 2025 (current version 5 May 2026)	Someone senior accountable for AI. An AI policy. A register of the AI you use, including AI built into other software. Human review matched to the stakes.	No one named. No register.

The good news: none of this is hard to put right. Section 7 lists what to do.

4. The jobs and hours now

Hours are a typical week outside busy season. Sam checked and signed off these figures on the day.

Job	Hours a week	Who does it	How I timed it
1. New client onboarding (about 4 new clients a week)	5	Priya	Watched on the day
2. Chasing clients for documents	5	Priya, Tom	Your records (sent reminders in Outlook)
3. Engagement letters	1.5	Sam	Your estimate
4. Month-end emails to bookkeeping clients	2	Lee	Your records (send times in Outlook)
5. Year-end tax returns	12	Sam, Tom	Your estimate
Total	**25.5**		

Signed: Sam Ridge, 6 October 2026

5. The map

Each step of each job goes one of three ways:

- **Hand to AI:** AI does it or drafts it. A person reads it before it goes anywhere.
- **Hand over with a check:** AI does the work, and a named person checks it against the source every time. The checking time is shown, and it's already taken off the hours back in section 8.
- **Keep human:** a person does it. AI doesn't touch it.

Job and step	Where it goes	Why
1. Onboarding: sighting the client's ID and filling in the ID checklist	**Keep human**	See section 6.
1. Onboarding: welcome email, the list of what's needed, and the ATO nomination steps for the client	Hand to AI	Drafting from a template. Priya reads it before it goes.
1. Onboarding: keeping track of who's nominated you and what's come in	Hand over with a check, about 15 minutes a week	Priya checks the ATO's nominations report before adding a client, within the 28 days (ATO).

Job and step	Where it goes	Why
1. Onboarding: the request to the previous accountant	Hand to AI	Drafting from a template, once the client has said yes (TPB).
1. Onboarding: setting the client up in Xero Practice Manager from their forms	Hand over with a check, about 30 minutes a week	AI's good at pulling details out, but it's personal information, so Priya checks each one against the form. Client permission first (TPB).
2. Chasing: first and second reminder emails	Hand to AI	Drafting from a template. Priya sends. No client data in public tools (CPA).
2. Chasing: working out what's still missing from a client's file	Hand over with a check, about 30 minutes a week	Comparing what's there against a list. Tom confirms before the client's told. Check and record AI output (TPB).
3. Engagement letters: first draft from the firm's template	Hand to AI	Drafting. Say how AI is used (CPA).
3. Engagement letters: fees and scope	Hand over with a check, about 15 minutes a week	The client relies on these. Sam signs off every letter.
4. Month-end emails: summary of the month	Hand over with a check, about 30 minutes a week	It has the client's figures in it. Lee checks every number against Xero before it's sent. Check and record AI output (TPB).
5. Tax returns: list of documents needed	Hand to AI	Drafting.
5. Tax returns: the figures in the return	**Keep human**	See section 6.
5. Tax returns: advice on what to claim	**Keep human**	See section 6.
5. Tax returns: checking a current ATO ruling	**Keep human**	See section 6.

6. What stays human, and why

- **The figures in a tax return.** They're your personal responsibility as the registered agent. AI can't carry that.
- **Advice a client acts on.** Same reason. It stays with you.
- **Checking a ruling or a rate.** AI can produce rulings that look real and aren't. You check the source yourself.
- **Sighting a new client's ID.** The Tax Practitioners Board asks you to sight the ID, in person or on video, and record what you saw. It doesn't recommend keeping a copy, or taking ID by email.

These stay human for good. Checking rulings could change if a tool comes along that shows you the actual source every time and you're happy to rely on it. I'd look at that again at your 12-month review.

7. Fix now

These are risks, so they don't wait for a choice between options. Each one comes from the guidance in section 3. None of them needs anything from me.

What to do	Why	Guidance
Stop client details going into the free AI tool on the personal phone	The free version isn't set up for client information	CPA, OAIC
Put a written AI use policy in place. Write your own from the guidance in section 3, or use any provider's	You don't have one, and it's the base for everything else	TPB, CPA, National AI Centre
Get client permission before their details go into any AI tool	Needed before any of the options in section 8 touch client details	TPB
Add a line on AI to your engagement letters and privacy policy	Neither mentions AI	CPA, OAIC
Name who's accountable for AI, and keep a list of the AI you use	No one's named and there's no list	National AI Centre

8. Your options

For each of jobs 1 to 4 I've set out the options I found that don't involve me: what each does, what it costs, and how many hours a week it gives back after checking. Job 5 stays human (section 6), so it has none. What I'd do is in section 10, kept apart so you can weigh these on their own.

How I worked out the figures. I didn't ask what anyone's paid. I cost the time at the award minimum for the role: Priya is full-time admin under the Clerks - Private Sector Award 2020, Level 3, which is $31.11 an hour at the minimum rate. Some of these jobs are Tom's, Sam's or Lee's time. Tom and Sam have no award rate, so I've costed all of it at Priya's rate, the lowest award rate in your firm. So these are the least the time is worth.

Check any figure yourself, or any quote you get. Months to pay back = cost to start ÷ (hours back a week × $31.11 × 4.33 weeks, less any cost a month).

Hours back are my estimates from what I saw, after checking time is taken off. Your real figures go in your records.

These are the options I found. There may be others. I looked at what your current software already does, the makers' own price pages, and products built for accounting firms.

Job 2 below is set out in full, the way every job will be in your report. In this sample, jobs 1, 3 and 4 show the short form. "Hours left" is what the job still takes each week with that option in place.

Job 1. New client onboarding (5 hours a week)

Taking on a client here runs to six steps: sighting their ID and recording it, getting them to nominate you with the ATO and adding them within 28 days, asking their previous accountant for last year's papers, setting them up in Xero Practice Manager, the welcome email with what you need, and the engagement letter (job 3). That's about 75 minutes for each of the 4 or so new clients a week. Sighting the ID stays

with Priya whatever you choose (section 6). For a client who wants a company set up, the AML/CTF rules may add their own checks (section 3).

	Fix without AI	What you already have	Content Snare
What it is	One onboarding checklist for all six steps, an ID checklist, and templates for the welcome, nomination and previous accountant emails	Copilot drafts the welcome, nomination and previous accountant emails	Onboarding forms sent and chased on the same plan as job 2, including the nomination confirmation and last year's papers
Cost to start	$124 (4 hours of Priya's time)	Nothing	$124 (4 hours of Priya's time)
Cost a month	Nothing	Nothing (in your licence)	Nothing more, if you have it for job 2 ($134 on its own)
Hours back a week (my estimate)	0.75 to 1.25	0.25 to 0.5	1 to 1.5
Hours left a week	3.75 to 4.25	4.5 to 4.75	3.5 to 4
Saves a month, after costs	$101 to $168	$34 to $67	$135 to $202
Pays back in	About a month	At once	Under a month

Ignition also does onboarding forms and ID checks, along with engagement letters (see job 3).

Job 2. Chasing clients for documents (5 hours a week)

	Fix without AI: portal only	What you already have: Copilot	Content Snare, Plus plan
What it does	Clients send documents one way only, against a standard list for their client type	Drafts a reminder email when someone asks it to, one at a time	Sends each client a request list, collects their files in its portal, and reminds them until it's done. Brings your clients in from Xero Practice Manager
What's left for your staff	Working out what's missing, and writing and sending every reminder	Working out what's missing, keeping track of who's been chased, and sending	Setting up each client's request, deciding what's missing from their file, and checking what comes in
Setting it up (my estimate)	About 4 hours: write the lists and tell clients	Nothing to set up	About 6 hours: request templates for each client type, and the link to Xero Practice Manager
Where client details are kept	Your portal, as now	Microsoft 365, under your licence	Content Snare's servers, on Amazon's cloud in the United States
Who checks	Priya and Tom, as now	Whoever sends the email reads it first	Priya marks each request complete once she's checked it
Limits	Clients who don't use the portal still need chasing	Nothing is tracked between emails	Up to 50 requests open at once, and 5 users

	Fix without AI: portal only	What you already have: Copilot	Content Snare, Plus plan
Cost to start	$124 (4 hours of Priya's time)	Nothing	$187 (6 hours of Priya's time)
Cost a month	Nothing	Nothing (in your licence)	$134 (US$85 plus GST, at the 8 October exchange rate)
Hours back a week (my estimate)	1 to 1.5	0.5 to 1	2 to 3
Hours still spent a week	3.5 to 4	4 to 4.5	2 to 3
Saves a month, after costs	$135 to $202	$67 to $135	$135 to $270
Pays back in	Under a month	At once	About a month

Some products chase clients as one part of a bigger system: Karbon's Business plan ($109 a user a month, so $436 for your four people; GST not stated) and FYI's Elite plan ($70 a user a month before GST, at least 5 users, so $385 with GST, rising on 1 November). Either would replace or sit beside Xero Practice Manager, so I haven't put them in the table. Prices are from each maker's own page on 9 October 2026.

Job 3. Engagement letters (1.5 hours a week)

	Fix without AI	What you already have	Ignition, Pro plan
What it is	One template with the fee and scope fields marked	Copilot in Word drafts from your template	Engagement letters as signed online proposals, with onboarding forms, ID checks and a link to Xero Practice Manager
Cost to start	$93 (3 hours of Sam's time, at the admin rate)	Nothing	$124 (4 hours of set-up)
Cost a month	Nothing	Nothing (in your licence)	$479 ($299, plus $3 for each client over 350)
Hours back a week (my estimate)	0.25 to 0.5	0.25 to 0.5	0.5 to 1
Hours left a week	1 to 1.25	1 to 1.25	0.5 to 1
Saves a month, after costs	$34 to $67	$34 to $67	Costs $344 to $412 a month more than it saves
Pays back in	1 to 3 months	At once	Doesn't, at these hours

Ignition is priced for firms that run every client agreement and payment through it. Its client data is kept in the United States.

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Job 4. Month-end emails to bookkeeping clients (2 hours a week)

	Fix without AI	What you already have	Fathom, Pro plan
What it is	One standard email with Xero's own report attached	Xero's own monthly reports, sent as they are	Branded monthly reports for each client from Xero, with AI commentary
Cost to start	$62 (2 hours of Lee's time, at the admin rate)	Nothing	$62 (2 hours of set-up)
Cost a month	Nothing	Nothing (in your Xero plan)	$979 with GST for 40 clients (more than 50 is quoted)
Hours back a week (my estimate)	0.5	0.25 to 0.5	0.75 to 1
Hours left a week	1.5	1.5 to 1.75	1 to 1.25
Saves a month, after costs	$67	$34 to $67	Costs $844 to $878 a month more than it saves
Pays back in	About a month	At once	Doesn't, at these hours

Fathom is priced by the number of clients connected, and also does forecasts and budgets. It's hosted on Microsoft Azure.

All four jobs, without me

If you took the option that saves you the most each month for each job, this is the total. For jobs 3 and 4 that's the fix without AI, since the products cost more than they save at your hours.

	1. Onboarding	2. Chasing	3. Engagement letters	4. Month-end emails	Total
Option	Content Snare (on the job 2 plan)	Content Snare	Fix without AI	Fix without AI	
Cost to start	$124	$187	$93	$62	**$466**
Cost a month	Nothing more	$134	Nothing	Nothing	**$134**
Hours back a week (my estimate)	1 to 1.5	2 to 3	0.25 to 0.5	0.5	**3.75 to 5.5**
Hours left a week	3.5 to 4	2 to 3	1 to 1.25	1.5	**8 to 9.75**
Saves a month, after costs	$135 to $202	$135 to $270	$34 to $67	$67	**$371 to $607**

The four jobs take 13.5 hours a week now. Without me, 8 to 9.75 of those hours are still spent each week.

9. Policy and staff

You need a written AI use policy (section 7). It should cover four things:

- what staff can and can't put into AI tools
- which tools the firm has approved
- who checks AI work before it goes to a client, and how that's recorded
- who's accountable (usually the principal)

Staff. Everyone I spoke to was keen, and nobody had been shown how to use AI safely. A short session once the policy's in place would cover what's allowed, how to check AI work, and where client details can and can't go.

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Your mail and accounts

Your email, your domain name and who can get into them sit under everything else in this report, so they get a page of their own. Your domain's public records were read from outside. On the day, you logged in and we went through the admin screens together. I didn't log in or take a password, nothing was changed, and no client mail or client files were opened.

What I looked at	What I found	Where it stands
Your domain name	It's in the firm's name, you can log in, and it renews in March 2027	OK
Where your mail goes	To Microsoft 365, on your own domain	OK
Proof your mail is really from you	SPF is right. DKIM is off and there's no DMARC record, so it's harder for other mail systems to tell your mail from a fake	Gaps 1 and 2
Other things that send as you	Your document portal sends notices with your address on them and isn't set up to pass those checks. Once DMARC is tightened, they could land in junk or bounce	Gap 3
Who looks after it	Nobody outside the firm. The firm signed up direct, so the account is yours	OK
Plan and licences	Business Standard, four licences, all in use	OK
Getting back in	One admin account, and it's also someone's everyday account. If it's locked, there's no second one to get back in with	Gaps 4 and 5
Two-step sign-in	Microsoft's security defaults are on	OK
Mail protection	The built-in protection is on. Microsoft's Standard settings, a tighter set against spam, malware and phishing, are off	Gap 6
Mail forwarded out	Set to Off, so automatic forwarding outside the firm is blocked	OK
One login a person	The screens show one account a person, and accounts@ is a shared mailbox. Nobody said they share a login	OK
People who've left	One unlicensed account can still sign in. The steps for when someone leaves are written down	Gap 7
Where the screen says your data sits	Australia. That's as far as this page goes	Noted
Backup	Nothing keeps a copy of your mail outside Microsoft	Your call

What this means for your security. Microsoft's own list for a small business starts with two-step sign-in and looking after admin accounts. Your security defaults cover the first. Gaps 4 and 5 are the second, and your mail holds clients' tax details and bank statements. Keeping a copy of your mail is your call. I haven't picked a backup product, so I don't recommend one.

What I didn't look at. Your computers, phones, network, antivirus, firewall, files and folders. This isn't a security audit, and a clean row doesn't mean nothing can go wrong.

What I can't do. I don't work on a domain or account someone else holds, or on the things I didn't look at. If you think someone's already got into your accounts, you need an IT security firm. I'm not one.

What it costs to close these: with a real report, a separate quote comes with it. You don't need me for any of them. This page is yours, so you can take it to anyone you like, including an IT provider.

10. What I can do for you

This is what doing it with me would look like: the jobs built in your own Claude account, as one Build. A Build is my service that sets up each job in Claude and trains your team on it. Each job is priced by its Tier. The Tier comes from the kind of work: drafting, summarising or pulling details out is Tier 1, and review or analysis is Tier 2. It goes up one if you rely on a figure it produces, and one if it sits next to a compliance duty, up to Tier 3. Your clients' personal information gets its own safeguards on every Tier. All prices include GST.

The short version. On my 12-month rule I'd take on job 2, chasing: $3,400 for the Build, paying back in 10.5 months at the better end of my estimates. With Set-up and the free fixes for jobs 1, 3 and 4 from section 8, that's $5,929 to start, saving $461 to $697 a month. All four jobs are shown below so you can see the whole picture.

My solution, job by job

	1. Onboarding	2. Chasing	3. Engagement letters	4. Month-end emails
What Claude does	Drafts the welcome, nomination and previous accountant emails, keeps track of each new client's steps, and sets up their details from the forms they send	When Priya starts it each morning, reads each client's file, lists who's missing what, and drafts the first and second reminders	Drafts each letter from your template	Drafts each client's summary from Xero
Who checks	Priya sights the ID herself, checks each detail against the form, and checks the ATO report before adding a client	Tom checks the list, and Priya reads each draft and sends it	Sam checks fees and scope on every letter	Lee checks every figure against Xero
Build	$4,200 (Tier 2)	$3,400 (Tier 1)	$4,200 (Tier 2)	$4,200 (Tier 2)
Why that Tier	It drafts the emails and pulls details out of the forms, and it sits next to your TPB and ATO nomination duties	It drafts the reminders, and checking a file against a list is pulling details out, which you can check	It drafts the letter, and it carries the fees your client relies on	It summarises the month, and it carries your client's figures
Hours back a week (my estimate)	2 to 3	2.5 to 3.5	0.75 to 1	1 to 1.5
Hours left a week	2 to 3	1.5 to 2.5	0.5 to 0.75	0.5 to 1

Client details stay in your firm's own Claude account, apart from what's below. I build it with you, train your staff on it, come back for a short follow-up session two to three weeks after go-live, answer your questions free for 30 days, and check in at 3, 6 and 12 months. All of that is in the Build price.

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What a Build needs

A Build runs in a Claude plan in your firm's name, under Anthropic's business terms. For a firm your size that's the Team plan: at least two seats, US$25 a seat a month billed monthly, with tax added at billing. I couldn't find an Australian price on Anthropic's pages. Two seats came to about $71 a month before tax at the 30 October exchange rate, about $78 with GST on top, and that's the figure in the tables below. One seat is for Priya, who runs the Build day to day, and one for you, with no extra charge from me for the second. Staff who only check a draft in Outlook or Xero don't need a seat.

Because these jobs handle your clients' personal information, each one runs on your Team plan, with a named person, Priya or whoever you choose, starting each run. It can run in a Claude chat, in Cowork or in Claude Code, and I'll pick whichever suits the job. In Cowork I set it to stop and ask before each action. Nothing with client details in it runs on its own on a schedule.

Why a business plan rather than a free or Pro one: on the Free, Pro and Max plans, Anthropic may use what you type to train its models unless each person turns that off in their own settings, and I've found no firm-level setting that lets you check they have. On Team and Enterprise it doesn't, by default.

You don't have a Claude plan now (section 2). Setting one up properly, with the privacy settings, your firm's context and your AI use policy inside it, is my Set-up and Onboarding service: $1,500 for a firm of 1 to 5 people. It's set up once, whatever you build, so it's in the totals below but not in each job's 12-month test.

Where your client files go

A common worry is client files going off to a server overseas, so here's the straight answer. Claude runs on Anthropic's servers in the United States and other countries, and anything the Build reads is processed there. On a Team plan, Anthropic doesn't use it to train its models by default, and your firm controls the account. Your clients' files don't come to me: I work inside your account with your named person present, and my data handling addendum, which comes with the Build agreement, sets out what can reach me (at most, file names in the reports your person sends, and only if you choose that, and those can carry your clients' names) and what never does. If the Privacy Act covers you (section 3), your privacy policy has to say that personal information goes overseas. Before a Build starts, I sit with you and read Anthropic's terms for your plan, so the decision to put client details in is yours, made with the terms in front of you, once you've got your clients' permission, as in section 7.

Your mail and accounts. With a real report, a separate quote for any gaps I can close comes with it. None of it counts in the 12-month test or the totals below.

Each job, counted on its own

I only take on a Build that pays for itself within 12 months, counted job by job. Each job carries its Build price, its share of the $1,500 Build fee less your $750 Audit fee (so $750 to share), and its share of the $78 a month Claude plan.

Job 2, built on its own (nothing shared, so it carries the whole $750 and the whole plan). It passes at the better end of my estimates:

Job	Cost	Saves a month, after the plan	Pays back in
2. Chasing	$4,150	$259 to $393	10.5 to 16.0 months

Job 1 doesn't pass with it. Built together with job 2, job 1 would cost $4,575 and save $230 to $365 a month after its half of the plan, paying back in 12.5 to 19.9 months, just outside my rule.

All four, if you built them (a test, with the costs shared four ways):

Job	Cost	Saves a month, after its share of the plan	Pays back in
1. Onboarding	$4,387.50	$250 to $385	11.4 to 17.6 months
2. Chasing	$3,587.50	$317 to $452	7.9 to 11.3 months
3. Engagement letters	$4,387.50	$82 to $115	38.1 to 53.8 months
4. Month-end emails	$4,387.50	$115 to $183	24.0 to 38.1 months

Job 1 only gets inside 12 months here because jobs 3 and 4 carry part of its costs, and they don't pass, so I won't take on jobs 1, 3 or 4 until they would. The free fixes in section 8 are the better buy for them. All these figures are at the award minimum, so if your people are paid more, every job pays back sooner.

The two totals side by side

	All four jobs, without me (section 8)	With me: job 2, plus the free fixes for 1, 3 and 4	All four jobs, with me
Cost to start	$466	$5,929: one Build ($3,400), the Build fee ($1,500) less the $750 Audit fee, Set-up ($1,500) and the three free fixes ($279)	$18,250: four Builds ($16,000), the Build fee ($1,500) less the $750 Audit fee, and Set-up ($1,500)
Cost a month	$134 (Content Snare)	$78 (Claude Team plan, two seats)	$78
Hours back a week (my estimate)	3.75 to 5.5	4 to 5.75	6.25 to 9
Hours still spent a week (of 13.5 now)	8 to 9.75	7.75 to 9.5	4.5 to 7.25
Saves a month, after costs	$371 to $607	$461 to $697	$764 to $1,134
Pays back in	About a month	8.5 to 12.9 months	16.1 to 23.9 months
Catches up with "without me" after		60.9 months	33.7 to 45.3 months
Ahead after three years, after all costs	$12,895 to $21,382	$10,661 to $19,147	$9,251 to $22,587

In the middle column, job 1's free fix is the onboarding checklist and templates, not Content Snare, since Content Snare only pays its way for job 1 when you have it for job 2 as well. Jobs 1, 3 and 4 are in the right-hand column so you can see the whole picture, but I wouldn't take them on yet (above).

All three are at the award minimum, as above. None counts what freed hours are worth if they go on billable work.

Prices

A Build, per job	$3,400 (Tier 1), $4,200 (Tier 2) or $5,500 (Tier 3), with the follow-up session, 30 days of questions and check-ins at 3, 6 and 12 months included
Extra Claude seats	No charge from me for the two seats a Team plan needs. $150 per job for each seat past two
Build fee	$1,500, once per Build, however many jobs are in it, for preparing the Build: the plan, what it has to pass before go-live, and the statement of work
The Audit fee	$750 comes off the Build fee if you go ahead within 90 days of this report
Set-up and Onboarding	$1,500 for 1 to 5 people: your Claude plan set up properly, with your AI rules in it. You pay Anthropic for the plan on top
An AI use policy	$750. You don't have to use mine. Any provider's will do, or you can write your own
Monthly tune-up (optional)	$750 a month, for up to 4 hours of checks and fixes to what's built

To start, reply to this report or call me, and we'll go through it together.

In 30 days I'll book a 20-minute call: what you've done, what's stuck. It's part of the Audit, whatever you choose.

This report is yours. Keep it, share it, take it to any provider.

It was drafted with AI (Claude) from my notes on the day, then checked and finalised by Chad Maxwell.