



SAMPLE AUDIT, INVENTED BUSINESS

AI AUDIT · QUARRY LANE TAX & ACCOUNTING

6.6 HOURS A WEEK

Your numbers, added up. Yours to keep.

About \$32,917 a year back.

About \$20,844 net return in year one, \$24,707 a year after that.

Minutes a week back to you, after the reading and sending that stays yours, priced at your own number over 50 working weeks. Rows marked estimated are my read of what you described; the rest are your own count. The right side is your investment to get them back, also estimated.

\$32,917

A YEAR BACK

MINUTES BACK A WEEK • DOLLARS A YEAR

 Financial software	91 min • \$7,583
 Email & inbox	77 min • \$6,417
 Documents	65 min • \$5,417
 Data entry	46 min • \$3,833
 Sales process	45 min • \$3,750
 Team & delegation	18 min • \$1,500
 Meetings	17 min • \$1,417
 Scheduling	16 min • \$1,333
 Customer service	11 min • \$917
 Content & marketing	9 min • \$750

\$12,073

YEAR ONE INVESTMENT

The Setup, two hours with me (includes month one of Accelerate)	\$1,397
Your 2 hours in that session, at \$100/hr	\$200
Getting the 16 builds working, about 11.7 hours of yours at \$100/hr (estimated)	\$1,167
Testing and fixing as you go, 10% of the hours back (estimated)	\$3,292
Accelerate for the other 11 months of year one	\$6,017

\$20,844

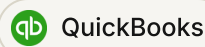
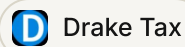
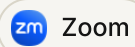
NET RETURN ON
INVESTMENT

Net return on investment, year one \$20,844

Every year after: \$32,917 back, less 5% for upkeep and 12 months of Accelerate \$24,707

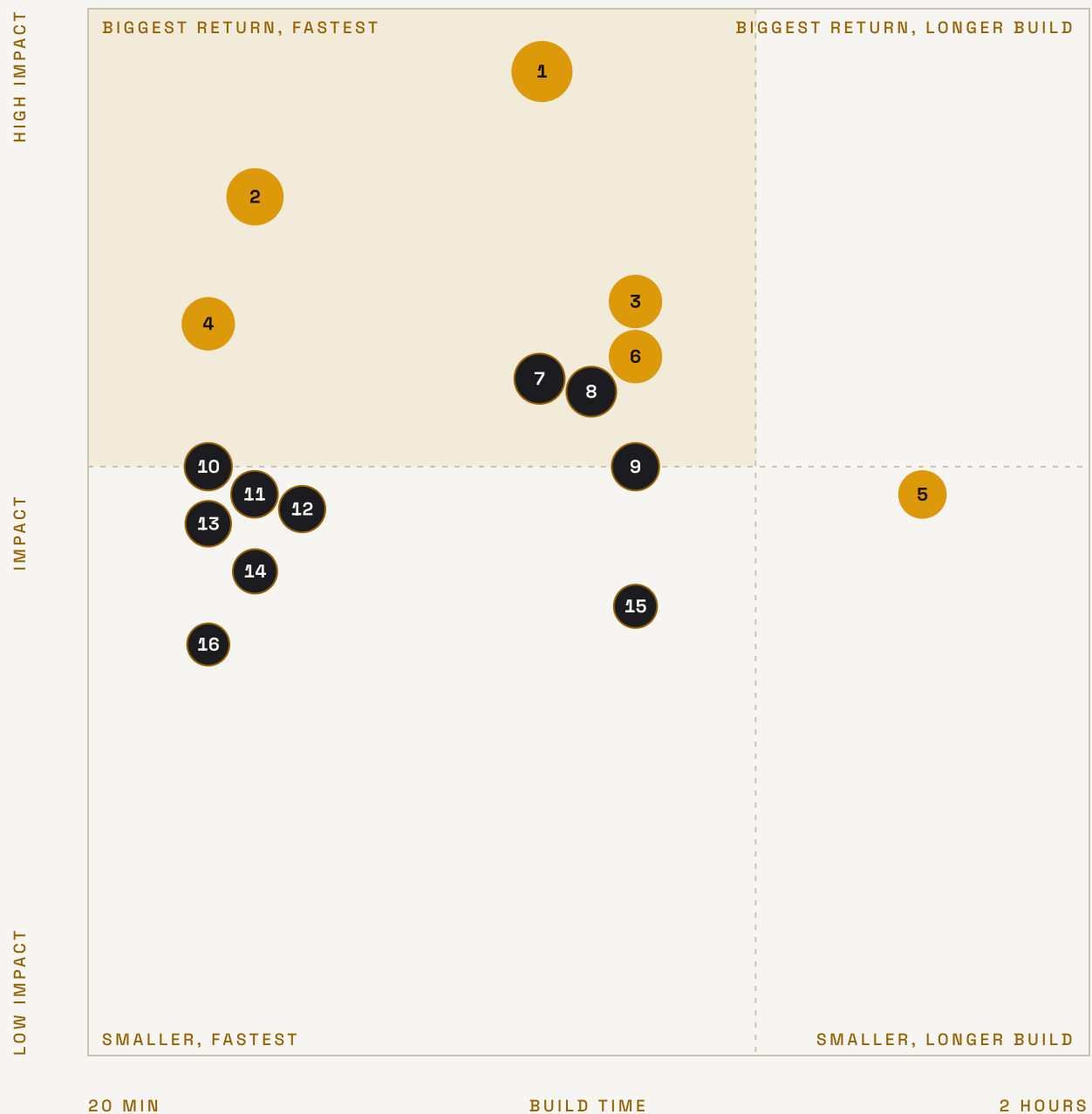
PAYS BACK THE SETUP, YOUR 2 SESSION HOURS AND YOUR 11.7 BUILD HOURS IN MONTH 2, AFTER THE TOOLS, THE TESTING AND THE PLAN





Where each one sits.

Gold is what to do first. Left to right is build time, not difficulty. Numbers match the list that follows.



All 16, nothing left out.

Each one runs from day one, some on your word, some on their own. Row returns are before the Setup, your own hours in that session and the monthly plan, which page 2 counts once.

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
DO FIRST • START HERE				
1	 Financial software 20 min, 18 times a month Categorizing bank feed transactions in QuickBooks for the monthly bookkeeping clients	Once a month it sorts every client's bank feed in QuickBooks by their own history and only asks about the odd ones.	\$5,000 86 → 26 min a week	\$4,400 about 1 h to build (est.)
2	 Email & inbox 10 min, 1 time a day Clearing the shared inbox each morning	Each morning it files the shared inbox by client and puts what needs a person on top.	\$3,750 50 → 5 min a week	\$3,342 about 20 min to build (est.)
3	 Email & inbox 3 min, 500 to 700 times a year • estimated Answering the same client emails in season: did you get my documents, where is my refund, what else do you need	It drafts the reply to each routine question from the client file in your voice and leaves anything about money for you.	\$2,250 to \$3,167 36 → 4 min a week	\$2,300 about 1 h to build (est.)
4	 Sales process 10 min, 150 to 200 times a year • estimated Preparing engagement letters for each return and each business client every season	It fills in each engagement letter from last year's fee and scope, ready to go out with the organizer.	\$2,250 to \$3,000 35 → 3 min a week	\$2,367 about 20 min to build (est.)
5	 Team & delegation 10 min, 150 to 200 times a year • estimated Reviewing the seasonal preparer's returns and typing up review notes	It compares each prepared return with last year's and drafts the review notes, so you open the file knowing where to look.	\$1,250 to \$1,667 35 → 17 min a week	\$1,150 about 2 h to build (est.)

III EVERYTHING WE FOUND, CONTINUED

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
6	 Financial software 8 min, 18 times a month Writing the month-end note to each bookkeeping client on what changed and what is still missing	When the books close it writes each client's month-end note from the QuickBooks numbers, missing items listed first.	\$2,583 35 → 4 min a week	\$2,225 about 1 h to build (est.)

THEN, IN ORDER OF WHAT THEY GIVE BACK

7	 Documents 5 min, 250 to 350 times a year · estimated Chasing missing tax documents from clients in season, one reminder email at a time	Every Monday in season it checks each client's checklist and sends the reminder for whatever has not come in.	\$1,917 to \$2,667 30 → 3 min a week	\$1,925 about 1 h to build (est.)
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8	 Data entry 10 min, 12 times a month Entering payroll hours and changes for the payroll clients every pay period	Clients send hours the way they already do and it puts them on the payroll sheet, flagging anything that changed.	\$2,167 29 → 3 min a week	\$1,850 about 1 h to build (est.)
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9	 Data entry 15 min, 60 to 90 times a year · estimated Keying brokerage 1099 detail into Drake Tax when the import fails	Send it the brokerage statement and it lays out every sale in the format Drake Tax imports.	\$1,333 to \$2,000 23 → 3 min a week	\$1,400 about 1 h to build (est.)
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10	 Documents 45 min, 20 to 30 times a year · estimated Drafting responses to IRS and state notices	Scan the notice and it drafts the response letter from the return, with the numbers checked.	\$1,333 to \$2,000 23 → 3 min a week	\$1,467 about 20 min to build (est.)
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III EVERYTHING WE FOUND, CONTINUED

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
11	 Documents 20 min, 40 to 60 times a year · estimated Explaining tax projections to clients in a plain-English summary	Hand it the projection and it writes a one-page summary in words a client can follow.	\$1,167 to \$1,833 20 → 2 min a week	\$1,317 about 20 min to build (est.)
12	 Meetings 20 min, 3 to 5 times a month · estimated Typing up notes after client planning meetings on Zoom	It writes the meeting note and the to-do list for both sides and files them in the client folder.	\$1,083 to \$1,833 19 → 2 min a week	\$1,242 about 20 min to build (est.)
WORTH ADDING  Granola free for core notes, then \$14 a month, after IT approval				
13	 Scheduling 5 min, 150 to 200 times a year · estimated Booking tax appointments by phone and email in January and February	Clients pick a slot on the booking page your Microsoft 365 already includes, and it sends the organizer and document list.	\$1,167 to \$1,500 18 → 2 min a week	\$1,167 about 20 min to build (est.)
14	 Sales process 30 min, 1 to 3 times a month · estimated Pricing new business clients and building the fee quote	Tell it what the business needs and it builds the fee quote from your rate sheet.	\$500 to \$1,583 14 → 1 min a week	\$942 about 20 min to build (est.)
15	 Customer service 3 min, 160 to 240 times a year · estimated Sending the quarterly estimated tax payment reminders	Before each quarterly deadline it emails every client their amount and how to pay.	\$750 to \$1,083 12 → 1 min a week	\$725 about 1 h to build (est.)
16	 Content & marketing 120 min, 4 times a year Putting out the quarterly deadline newsletter	Each quarter it drafts the newsletter from the coming deadlines and the questions clients asked most.	\$750 10 → 1 min a week	\$642 about 20 min to build (est.)

Not on your plate today.

Things you said you want that nobody is doing by hand today, so they carry no dollar number. The by-hand figures are my estimate of what each would cost you to run yourself.

ON YOUR LIST	WHAT IT BECOMES	BUILD	BY HAND
A year-end letter for every individual client on what to change going forward	In December it writes each client a short letter on what to do differently next year, from their own return.	about 1 h, once	about 20 min each 150 to 200 a year, ongoing
A welcome kit for new business clients	When a business signs on it sends the welcome, the document checklist and the first-month calendar.	about 20 min, once	about 30 min each 1 to 3 a month, ongoing

One two-hour session turns it on.

The session is \$850, on your machine, on your accounts. You leave with the first wins running, or the Setup is free.

Cruise

\$147 a month

The full system, the community, the weekly call. You run it.

Start at \$997: the Setup plus month one

FITS WHAT YOU
DESCRIBED

Accelerate

\$547 a month

Cruise, plus an hour of my time every month.

Start at \$1,397: the Setup plus month one

Overdrive

\$1,197 a month

Accelerate, with three hours a month. I sit inside the business.

Start at \$2,047: the Setup plus month one

BOOK THE SETUP

Not ready for a plan? A one-off working session runs \$497.

This audit is yours either way. Take it to someone else or do it yourself. The numbers still hold.