SAGE FOR ACCOUNTANTS

AI readiness checklist for accountants and bookkeepers

AI is no longer optional - but most firms aren't fully prepared yet.

Across the profession there's a clear readiness gap: firms know AI matters, but few have the strategy, skills and safeguards in place to use it with confidence. This checklist helps you assess where your firm stands today and pinpoint the practical next steps that move you forward. No jargon. No overwhelm.

Based on insights from the **State of the Nation:** AI in Accountancy report, produced in association with Sage and AccountingWEB, this checklist helps you assess where your firms stands today...

PART 1: ASSESS YOUR FIRM - TICK EVERY STATEMENT THAT'S TRUE TODAY

A Strategy and awareness

- [ ] We feel we understand what AI can — and can't — do in an accounting context.
- [ ] We've identified specific areas where AI could improve efficiency.
- [ ] Our firm's leadership has a clear view on why AI matters to our future.

B Skills and capability

- [ ] Team members feel confident using AI tools in their day-to-day work.
- [ ] We have training or practical guidance in place to build AI skills.
- [ ] At least one person clearly owns AI adoption within the firm.

C Tools and technology

- [ ] We use AI features built into our core accounting software.
- [ ] We know which external tools (e.g. ChatGPT) our team uses.
- [ ] Any external AI tools are used under clear governance, not ad hoc.

D Governance and risk

- [ ] We have a written AI usage policy the whole team understands.
- [ ] Both we and our clients are clear on data security and confidentiality rules.
- [ ] We know which client data should and should not be shared with AI tools—and why this matters.

E Workflows and use cases

- [ ] We've automated repetitive tasks like data entry and bookkeeping.
- [ ] A person always reviews AI output before it reaches a client.
- [ ] We use AI to support client communication or reporting.

PART 2: YOUR MATURITY — COUNT YOUR TICKS (16 TOTAL)

0 - 5 TICKS

Early stage

AI is on your radar but not yet embedded. The opportunity now is to build awareness and try a first, low-risk win. There's everything to play for— and nothing to lose.

6 - 11 TICKS

Developing

You've made real progress. Focus on tightening governance and giving your team the skills to use AI consistently, as well as the best tools they need to be efficient and aim for growth.

12 - 16 TICKS

Ready to scale

Strong foundations are in place. You're ready to embed AI deeper into core workflows and lead on adoption. But be careful not to be complacent—AI changes radically with each new release. Stay on top.

PART 3: WHAT TO DO NEXT

0 - 5 TICKS

Early stage

- Start with one simple use case (e.g. automating admin or data entry)
- Build awareness across your team
- Begin with low-risk, secure tools

6 - 11 TICKS

Developing

- Introduce clear AI usage guidelines or a policy
- Standardise how your team uses AI tools
- Explore embedded AI solutions within your accounting software

12 - 16 TICKS

Ready to scale

- Integrate AI across core workflows
- Expand into advisory and insight-led services
- Focus on efficiency gains and capacity creation

Using AI with confidence

Many firms are using external tools without clear governance. The safest and most effective approach is to use AI that's embedded within your core accounting systems. Tools like Sage Copilot, built into Sage for Accountants, are designed to:

- Operate within secure, compliant environments
- Support workflows you already use
- Give you control and visibility over AI outputs

Explore the full research

Read the report

Start your AI journey with Sage for Accountants

Get started today