



STUDENT WORKBOOK

AI for CAs, Accountants and Finance Teams

5 days, 2 hours a day · Online across India, in person from Jaipur



AI Coaching India

This workbook belongs to _____

Batch code: _____

AI for CAs, Accountants and Finance Teams: Your Workbook

Dear practitioner,

You bill by the hour, so this workbook is built to pay for itself fast. Every prompt from the five evenings is here with blanks, so during season you can rebuild a client email, an opinion skeleton, a formula or a circular brief in the time it takes tea to arrive. Write in it during class, mark what worked for your practice, and keep it next to the laptop where the drafting happens. Two disciplines run through every page: no client-identifying data ever enters an AI tool, and no legal reference leaves your desk unverified. Everything else, AI can draft faster than any article you have ever trained.

Yours in the season and out of it,

Team AI Coaching India

Before day one

- Install or bookmark ChatGPT (chatgpt.com) and Google Gemini (gemini.google.com); create free accounts with a personal email.
- Bookmark copilot.microsoft.com (free chat), perplexity.ai, and notebooklm.google.com; free accounts for each.
- Bring a laptop with Excel or Google Sheets. This course is drafting-heavy and a laptop makes it comfortable.
- Think of the three client emails you rewrite most often, and one circular you have been meaning to actually read.
- Have some dummy data ready or use ours; we never practise on real client sheets.
- One reassurance: nothing here needs coding or IT skills. If you draft emails and use Excel at any level, you are fully equipped.

Day 1: First drafts in minutes, not hours

What today was really about

The first thirty minutes put AI to work, and the rest of the evening turned your most repeated writing into a template bank. The insight: most client communication is the same twelve situations wearing different names, so draft each situation once, properly, with placeholders, and reuse it forever. You practised setting tone, firm but polite, formal but human, because a fee reminder and a document request should not sound like the same letter. And you met the rule that never bends: no client names, PANs, financials or identifying details go into AI. Placeholders in, real details added later, in your own files.

Prompts we used

1. I am a chartered accountant in India. Draft an email to a client requesting pending documents for _____ (nature of work, e.g. audit, return filing). Use placeholders like [CLIENT NAME],

[DOCUMENT LIST], [DATE NEEDED]. Polite but firm, short paragraphs, professional but not stiff. I will fill placeholders outside this tool.

2. Draft a fee follow-up email for an invoice that is [NUMBER] days overdue. Courteous, no apology for asking, clear next step. Placeholders only.
3. Rewrite this email to be firmer without becoming rude. Keep it under 120 words: _____
4. A client has received a routine notice and is panicking. Draft a reassuring email that explains in plain words what the notice type _____ generally means, what we will do, and what I need from them. No specific legal citations; I will add specifics myself after checking the actual notice.
5. Take this rough note I typed and turn it into a clean client email with a subject line:

6. Create a master list of the 10 client email situations a CA office faces most, so I can build a template for each. Then draft template number _____ .

Now you try

1. Build your five-template bank from the situations you actually face. List the five situations:

2. Take a real email you sent recently, strip every identifying detail, paste it, and ask AI to improve tone and clarity. What did it fix? _____
3. Draft the email you have been postponing, using placeholders. Time it: _____

Watch out

WATCH OUT

The confidentiality rule starts today and never bends: no client names, PANs, GSTINs, financial figures or identifying details in any prompt. Placeholders and dummy details only. Real names are typed later, in your own drafts folder, outside AI. Your licence and your reputation are worth more than a saved minute.

My notes

Day 2: Opinions and notes: structure first

What today was really about

Opinion drafting has two layers: the skeleton and the law. Tonight you learned that AI is excellent at the first and dangerous at the second. It structures beautifully: facts, issues, provisions to check, reasoning placeholders, conclusion. But you watched it invent a section number live, with total confidence, and that demonstration is the whole lesson: every section, case and date comes from your

own library, never from AI. Used this way, AI removes the blank-page hour and leaves you the part you are actually paid for: judgment.

Prompts we used

1. Structure a draft opinion note on the following anonymised issue: _____. Give me headings only: facts as stated, issues arising, provisions and notifications to be checked (leave as placeholders for me to fill), analysis skeleton with reasoning placeholders, tentative conclusion placeholder, caveats. Do not cite any specific section numbers, case names or dates; I will insert all legal references from my own sources.
2. Here is my rough analysis in shorthand. Rewrite it as clean, formal prose for a client note, keeping every technical point exactly as I stated it and adding nothing: _____
3. Rewrite this paragraph for a client who is not from finance. Plain words, no jargon, same meaning: _____
4. List the questions a careful reviewer would ask about this draft note, so I can strengthen it before a partner sees it: _____
5. Draft a covering email sending this opinion to a client, summarising the conclusion in two plain sentences, with a placeholder for the conclusion itself.

Now you try

1. Pick a live issue from your practice, anonymise it fully, and build the skeleton with prompt 1. Which heading did AI structure better than your usual format? _____
2. Ask AI a question you know the answer to, involving a specific section number. Did it get the section right? Write what it claimed versus the truth: _____
3. Take your densest recent paragraph and run prompt 3. Would your client have understood the original? _____

Watch out

WATCH OUT

AI invents sections, case law, dates and notification numbers, fluently and confidently. Nothing it cites is real until you have opened the bare act, the circular or your own library and seen it yourself. Structure from AI, law from the source. That order protects your name.

My notes

Day 3: Excel help that actually helps

What today was really about

Tonight AI became the Excel colleague every office wishes it had: the one who writes the formula, explains the inherited monster nobody understands, and never sighs. The skill you practised is description: say what you want in plain words, name your columns, state the layout, and the right formula comes back with an explanation. You built a reconciliation helper on dummy data, the workflow that eats the most hours in most offices. And you learned the boundary: describe the structure of your sheets to AI, but never paste real client ledgers, salaries or financials. Dummy data does everything real data would, without the risk.

Prompts we used

1. I have an Excel sheet where column A is _____, column B is _____, column C is _____. I want to _____ (what you want in plain words). Give me the exact formula, tell me which cell to put it in, and explain it in one plain sentence.
2. Explain this formula to me step by step in plain words, as if to someone who did not write it:

3. This formula returns _____ (error or wrong result). The columns contain _____. List the most likely causes in order and how to check each one.
4. I have two lists on dummy data: Sheet1 has invoice numbers and amounts from our books, Sheet2 has invoice numbers and amounts from the party's statement. Give me formulas to flag: items in Sheet1 missing from Sheet2, items in Sheet2 missing from Sheet1, and matching invoice numbers with different amounts. Explain each formula.
5. Give me formulas to clean this column: remove extra spaces, fix inconsistent capitalisation, and split _____ into two columns. My data looks like: _____ (describe or give two dummy examples).
6. Create 10 rows of realistic dummy data for practising this reconciliation, as text I can paste into Excel.

Now you try

1. Describe your most annoying recurring Excel task with prompt 1. Paste the formula into a sheet with dummy data. Did it work first time? _____
2. Find the oldest inherited formula in your office files, paste just the formula (never the data), and get it explained. Write the plain-words version: _____
3. Build the two-list reconciliation on dummy data end to end. How long did it take? _____

Watch out

WATCH OUT

Describe your sheets, never paste them. Column names and structure are safe; client ledgers, salary sheets, party statements and financials are not. Practise on dummy data, then rebuild the working formula inside your own file, on your own machine. Same result, zero exposure.

My notes

Day 4: Circulars, notifications and verification

What today was really about

Reading everything is impossible; reading nothing is malpractice. Tonight you built the middle path: a weekly routine where AI summarises, you verify line by line against the source, and a one-page brief goes into your file. The verification is not decoration, it is the product. A summary you have checked becomes something you can speak from with clients; a summary you have not checked is a rumour with formatting. NotebookLM added the second trick: upload the documents you trust and ask questions that are answered only from those pages, with references you can click and confirm.

Prompts we used

1. I am pasting the text of a circular or notification. Summarise it under these headings: what it changes, who it applies to, dates that matter, what is explicitly not covered, and open questions. Quote the exact line of the source under each point so I can verify. Add nothing that is not in the pasted text.
2. From this same text, list every date, threshold, rate and deadline it mentions, each with the exact quoted line it comes from.
3. Rewrite the verified summary as a short client advisory in plain words, with a placeholder where I will insert my professional view. No citations beyond the circular itself.
4. In NotebookLM, after uploading the circulars you trust, ask: What does the uploaded circular say about _____ ? Show the exact passage.
5. Draft a two-line WhatsApp update for clients about this verified change, factual, calm, no alarm, ending with: details on call if this affects you.

Now you try

1. Take the circular you chose before day one, run prompts 1 and 2, then verify each point against the source. Write one point the summary got subtly wrong or oversimplified: _____
2. Build the client advisory version with prompt 3. Would you send it as-is or with edits?

3. Upload two related documents into NotebookLM and ask one cross-document question. Write the question and whether the cited passage checked out: _____

Watch out

WATCH OUT

Every point in an AI summary is unverified until you have matched it to the exact line of the source. Check the dates twice; summaries flatten "with effect from" details more than anything else. File the brief only after the line-by-line check, and note the date you verified it.

My notes

Day 5: Proposals, engagement letters, visibility

What today was really about

The last evening was about the practice itself: winning work, onboarding it cleanly, and being visible without crossing professional lines. Your proposal now states scope, deliverables, timelines and assumptions so clearly that scope creep has nowhere to hide. Your engagement letter is a reusable template, adapted per client in minutes. And your visibility plan stays inside professional norms: educational posts and client explainers, never solicitation or tall claims. You closed the course by writing your own firm's AI usage policy, one page that turns five days of habits into standing rules for everyone who works with you.

Prompts we used

1. Draft a proposal for _____ services (e.g. accounting and compliance retainer) for a prospective client. Sections: understanding of requirements, scope of work as a numbered list, deliverables, timelines, assumptions and exclusions, commercial terms placeholder, validity. Use placeholders like [CLIENT NAME] and [FEE]. Formal, confident, no superlatives.
2. Convert this proposal into an engagement letter template with placeholders, including scope, responsibilities of both sides, limitation of scope, and a fees clause placeholder. I will have it reviewed against my institute's format before use.
3. Write a short educational post explaining _____ (a concept clients commonly misunderstand) in plain words, under 150 words, purely informative, no offer of services, no claims about my firm.
4. Create a one-page firm profile outline: who we serve, services, approach, and a short professional introduction placeholder. Factual tone, no superlatives, no client names. I will design it in Gamma or Canva.
5. Draft a one-page AI usage policy for my firm: what AI may be used for (drafting, structure, summaries on placeholders and dummy data), what is banned (client-identifying data in any tool, unverified legal citations in any deliverable), and the verification rule before anything leaves the office.

Now you try

1. Build the proposal and engagement letter pair for the service you most want more of. What assumption or exclusion did you add that your current letters lack? _____
2. Write one educational post with prompt 3 on the question clients ask you most. Would your institute's norms permit it as written? _____
3. Draft your firm's AI policy and read it as if you were your newest article. What would confuse them? _____

Watch out

WATCH OUT

Two checks before anything client-facing leaves this evening's work: the engagement letter against your institute's current format and code, and every visibility post against professional conduct norms on advertisement. AI drafts quickly, but the professional standards are yours to uphold, not its.

My notes

Your complete prompt library

Day 1: Client emails

1. Document request email for _____ with [PLACEHOLDERS], polite but firm.
2. Fee follow-up for an invoice [NUMBER] days overdue, courteous, clear next step.
3. Rewrite this email firmer but not rude, under 120 words: _____
4. Reassuring email about notice type _____ : what it generally means, what we will do, what I need. No citations; I add specifics after checking the notice.
5. Turn this rough note into a clean client email with subject line: _____
6. The 10 most common CA office email situations; then draft template _____ .

Day 2: Opinions and notes

1. Opinion skeleton on this anonymised issue, headings only, provisions as placeholders, no section numbers or case names: _____
2. Rewrite my shorthand analysis as formal prose, adding nothing: _____
3. Plain-words version of this paragraph for a non-finance client: _____
4. Reviewer questions to strengthen this draft before a partner sees it.
5. Covering email with a two-sentence plain conclusion placeholder.

Day 3: Excel

1. Columns are _____ ; I want to _____. Exact formula, cell, one-line explanation.
2. Explain this formula step by step in plain words: _____
3. This formula misbehaves (_____); likely causes in order, with checks.
4. Two-list reconciliation on dummy data: missing in each direction plus amount mismatches, formulas explained.
5. Cleanup formulas: spaces, capitalisation, splitting _____ , based on dummy examples.
6. 10 rows of realistic dummy data for reconciliation practice.

Day 4: Circulars

1. Summarise this pasted circular: changes, applicability, dates, not covered, open questions, exact quoted line under each point.
2. Every date, threshold, rate and deadline, each with its quoted line.
3. Verified summary as a plain-words client advisory with my-view placeholder.
4. NotebookLM, on uploaded documents: what does the circular say about _____ , show the passage.
5. Two-line calm client WhatsApp update on the verified change.

Day 5: Proposals and policy

1. Proposal for _____ services: understanding, numbered scope, deliverables, timelines, assumptions and exclusions, commercial placeholder, validity.
2. Engagement letter template from the proposal, to be checked against my institute's format.
3. Educational post on _____ , under 150 words, informative only, no solicitation.
4. One-page firm profile outline, factual, no superlatives, finished in Gamma or Canva.
5. My firm's one-page AI usage policy: allowed, banned, and the verification rule.

Your safety card

- Never enter into any AI tool: client names, PANs, GSTINs, Aadhaar numbers, account numbers, financial statements, salary data, party ledgers, or any detail that identifies a client.
- Placeholders and dummy data in AI; real details typed later in your own files, on your own machine.
- No section number, case law, date or notification from AI is real until you have verified it in the bare act, the official circular or your own library.
- Describe spreadsheet structure to AI; never paste the actual client sheet.
- Check engagement letters and any public-facing material against your institute's current norms before use.
- Log what you verified and when, on the brief itself. Season-you will thank workshop-you.

Keep going: your 30-day plan

- Week 1: use two templates from your email bank on real work (placeholders filled outside AI). Retire the old versions.
- Week 2: run the circular routine once: summarise, verify line by line, file the one-page brief. Book a fixed 30 minute slot for it weekly.
- Week 3: solve one real Excel annoyance via dummy-data practice, then rebuild it in the live file. Teach the method to one junior.
- Week 4: send one proposal from your new template, and put your firm AI policy where every junior can see it.
- Ongoing: one verified brief and one improved template per week. Ten minutes a day compounds like interest.

Plain-words glossary

- AI: software that predicts and produces text; a fast drafter with no accountability.
- Chatbot: an AI you type to, like ChatGPT, Gemini or Copilot.
- Prompt: your instruction to AI; specific beats clever.
- Hallucination: AI stating false things confidently, including invented sections and case law.
- Placeholder: a blank like [CLIENT NAME] filled in later, outside AI.
- Dummy data: made-up figures with realistic structure, safe to practise on.
- Anonymised: stripped of every detail that could identify a client.
- Skeleton: the structure of a document before the substance goes in.
- Reconciliation: matching two lists and explaining every difference.
- NotebookLM: a free tool that answers questions only from documents you upload, with references.
- Perplexity: an AI search tool that cites sources you can open and check.
- Verification: matching every AI claim to its source before it leaves your desk.
- Template bank: your reusable set of drafted documents, built once, used all season.