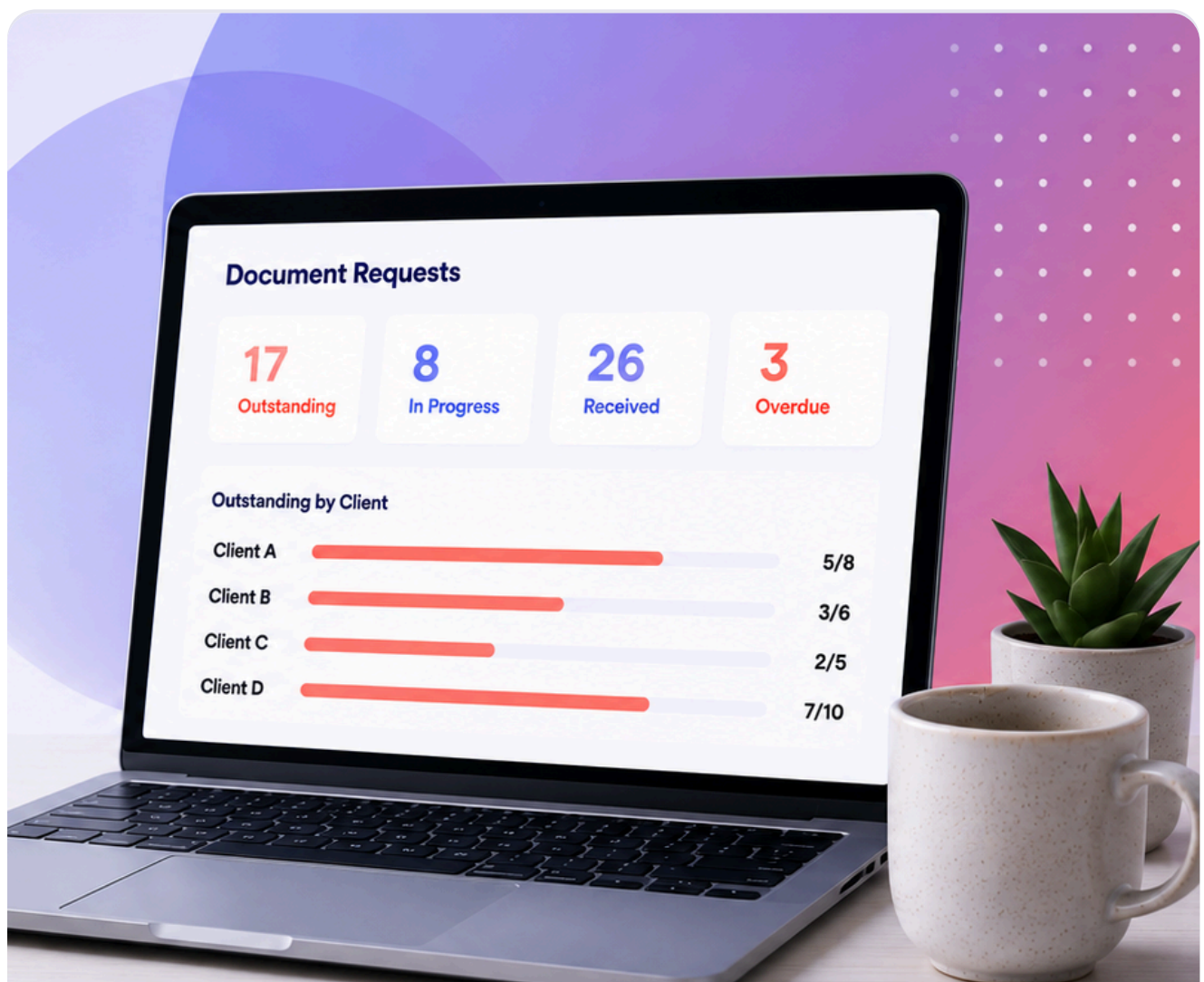


A QUIGLY AI FIELD GUIDE

Why most practices solve document chasing in the wrong order.

A four-level framework for Australian accounting and bookkeeping practices — and how to know which next move actually pays back.

• By **Mark Williams** · Founder, Quigly AI



THE 8PM TUESDAY

It's 8pm on a Tuesday in early July. Tax season is in full swing. The principal of a Melbourne accounting and bookkeeping practice is at her kitchen table, going through her client list one more time, sending personalised "just following up" emails to the seventeen clients whose source documents still haven't landed.

Some of those clients she emailed two weeks ago. Some she emailed two months ago. She closes the laptop at 10pm, makes a mental note to ring three of them tomorrow — and knows full well she'll be doing the same thing again next Tuesday.

If you've ever been that person, this article is for you.



Most practices assume document chasing is a tools problem. It isn't. It's a workflow design problem dressed up as a tools problem.

THE REAL PROBLEM

It's not your tools. It's the system you're running on.

The system most practices run on looks like this: a person remembers to chase a client. That person is usually the principal or a senior bookkeeper. When that person is busy — which is always — chasing stops happening.

When chasing stops happening, returns go out late, BAS preparation gets compressed into impossible windows, and the team starts EOFY already behind.

Buying a different tool doesn't fix this on its own. What fixes it is **moving the chasing decision out of someone's head and into a system**. Which system you need depends on where your practice currently is.

There are four levels.

DOCUMENT CHASING · THE FOUR LEVELS

Where is your practice **running today?**

Each level moves more of the chasing out of a person's head and into a system. The goal isn't to leap to the top — it's to know which rung you're on, and what the next move from here actually is.

1

Manual chasing

Emails sent one at a time, by a person, when they remember. Spreadsheet maintained by hand, or none at all — it's all in someone's head and inbox. Most practices that think they have a tools problem are actually at Level 1.

Breaks down ~30 clients

Works at low volume

2

Templated reminders with a tracker

A list or workflow captures what's outstanding. Reminder emails go out using templates, often built into the practice management system you already own. Someone still has to press send, but they're sending the right message to the right person with one click.

Setup: a few hours

Cost: usually zero

3

Portal-based document collection

A purpose-built platform takes over the chasing entirely. Clients get a personalised checklist, see what's outstanding, upload through a portal, and receive automated reminders on a schedule the practice configures once. The principal sees a dashboard, not an inbox.

Setup: a day or two

Best over 50 clients

4

AI-augmented document collection

The system reads what's already been received, knows what's still missing for a specific BAS lodgement or annual return, drafts contextual chase emails referencing the documents outstanding, and escalates intelligently. Few practices are here yet.

Future state: 12–18 months

The next Level 3

HOW TO KNOW WHICH LEVEL IS RIGHT FOR YOU

Four factors decide it.

1

Client count

Below 30 clients, Level 2 is often enough. Above 60, you're losing principal hours at Level 2. Above 100, you almost certainly need Level 3.

2

Existing tech stack

You may have Level 2 capability sitting unused in your current practice management system. Sometimes the right move is a two-hour configuration of what you already own.

3

Where the principal's time goes

If chasing is consuming evenings and weekends of senior people, ROI on Level 3 is usually under three months. If it's already distributed across junior staff, the case is weaker.

4

Compliance & audit exposure

The higher the compliance stakes — SMSF audit work, complex group structures, NDIS provider clients — the more value in an auditable Level 3 system.

THE BOTTOM LINE

The right answer is rarely the most expensive one. It's usually the next one.

Most practices buy tools before they need them, or buy tools that don't fit the level they're actually at. The question isn't "what's the best document chasing tool" — it's "what level is my practice operating at, and what's the next move from here?"

If you're not sure where you are, that's exactly what an **AI Opportunity Assessment** is built to surface. We map your current workflows, find the moves you can make this week using what you already own, and identify which investments will pay back fastest as you grow.

A WORKED EXAMPLE



LEVEL 1 → LEVEL 2, IN ONE AFTERNOON

Hana, a Melbourne bookkeeper

Hana was operating squarely at Level 1 — chasing manually, no tracker, the system living in her head and inbox.

The interesting finding wasn't that she needed a new platform. It was that her existing practice management system **already had Level 2 capability she wasn't using** — templated reminder workflows and a tracker that just needed configuring. Two to three hours of setup, zero additional cost, and she moved from Level 1 to Level 2 without buying anything new.

This week · Level 2



When volume justifies · Level 3

We also flagged a longer-term move to Level 3 for when client volume justifies it. That's a future investment, not an immediate one. The right answer for Hana right now was **the change she could make this week, using tools she already owned.**

ABOUT QUIGLY AI

Quigly AI helps Australian small and medium businesses turn AI from a buzzword into measurable operational gain. Led by **Mark Williams** — 20+ years in enterprise technology advisory and two technology business exits.

Practical AI

Real results

Future-ready

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