CUSTOM AI ASSISTANT · WORKBOOK

Business knowledge workbook

Everything your team, and your AI tools, need to answer customers the way your best person would. The blue writing is a filled-in example for a sample accounting office.

Write it like you'd say it

Plain sentences beat bullet fragments. AI tools copy your tone.

Prices with their exceptions

A price plus what changes it is what stops wrong answers.

Say when to hand off

Every answer the AI shouldn't give goes to a person, by name.

Never include: customer names or contact details, card or bank numbers, Social Security numbers, passwords or door codes, health information, or anything your contracts say is confidential.

The seven sections

SECTION	WHAT GOES IN	TIME
1 · The basics	Who you are, where you work, hours, how to reach you	10 min
2 · Services and prices	Every service, its price and what changes it, in your words	30 min
3 · Policies	Booking, cancellations, payment, warranties	15 min
4 · Top questions	The 20 questions customers ask most, with your answers	30 min
5 · How things get done	Your key processes as numbered steps	45 min
6 · Voice and limits	Your words, and what goes to a person	15 min
7 · Keeping it current	Who owns it, and when it's checked	5 min

How to fill it in

1. Read the blue example in each section first: it shows the level of detail that makes AI answers good.
2. Fill in the blank boxes under it, in Word or by hand. Plain sentences are fine.
3. Do one section at a time. Most businesses finish in two or three sittings.
4. Save the finished workbook as one file: that file is your knowledge pack.

SECTION 1 · THE BASICS

Who you are and how to reach you

Every answer leans on these facts, so keep them short and exact.

BUSINESS NAME (AND NAMES CUSTOMERS USE)

Parkside Accounting. Clients also say "Parkside".

WHAT YOU DO, IN TWO SENTENCES

We prepare personal and small business tax returns, and keep monthly books and payroll for small businesses. We also help clients answer IRS and state letters.

WHERE YOU WORK

Clients across the county, at our office on Main Street or by video from anywhere in the state.

HOURS

Mon–Fri 9 a.m.–5 p.m. From February to April 15, also Sat 9 a.m.–1 p.m. by appointment.

HOW CUSTOMERS REACH YOU, AND HOW FAST YOU REPLY

Call or text (555) 014-3380, or book at parksideaccounting.example. Messages answered within one business day.

Your answers

BUSINESS NAME (AND NAMES CUSTOMERS USE)

HOW CUSTOMERS REACH YOU, AND HOW FAST

WHAT YOU DO, IN TWO SENTENCES

WHERE YOU WORK

HOURS, INCLUDING HOLIDAYS

SECTION 2 · SERVICES AND PRICES

One box per service

If a price depends on the job, say what it depends on and the range you're comfortable saying out loud.

SERVICE NAME
What customers call it, not your internal code.

Personal tax return

PRICE & WHAT CHANGES IT

From $325 for a standard return. $150 more per rental property; $200 more for a small business schedule.

HOW LONG IT TAKES

About 2 weeks after all documents arrive.

WHAT'S INCLUDED

Federal and one state return, e-filing, a 20-minute review of the finished return, and answers to letters about it for a year.

THE WAY YOU'D SAY IT ON THE PHONE
Write it exactly as your best person would say it.

"A standard return starts at $325. If we have your documents by March 15, we'll file by the April deadline. Want me to send you the upload link?"

WHEN AI SHOULD HAND OFF TO A PERSON

Any question about whether something is deductible, an IRS or state letter, or a client who's behind on filing.

WHAT AI MUST NEVER SAY ABOUT IT

Whether a deduction is allowed, or how big a refund or balance due will be.

Your services

SERVICE NAME

PRICE & WHAT CHANGES IT

HOW LONG IT TAKES

WHAT'S INCLUDED

THE WAY YOU'D SAY IT ON THE PHONE

WHEN AI SHOULD HAND OFF TO A PERSON

WHAT AI MUST NEVER SAY ABOUT IT

SERVICE NAME

PRICE & WHAT CHANGES IT

HOW LONG IT TAKES

WHAT'S INCLUDED

THE WAY YOU'D SAY IT ON THE PHONE

WHEN AI SHOULD HAND OFF TO A PERSON

WHAT AI MUST NEVER SAY ABOUT IT

More services, in short

SERVICE	PRICE OR RANGE	WHAT CHANGES THE PRICE	HAND OFF WHEN
Example: Monthly bookkeeping	From $350 a month	Over 150 transactions a month	More than 3 months behind
Example: Extension	Free for current clients	New clients: $75	The client can't pay the tax owed

MINIMUM CHARGES, TRIP FEES, DEPOSITS

Returns are paid before we file. 50% deposit on business returns and bookkeeping cleanups.

WHAT YOU DON'T DO

No investment or financial planning advice, and no payroll for more than 50 employees.

YOUR MINIMUMS, TRIP FEES, DEPOSITS

WHAT YOU DON'T DO

SECTION 3 · POLICIES

The rules customers ask about

Write the rule, then the exception. AI tools get policies wrong when the exception is missing.

BOOKING

Book online or by phone. First reviews within a week; from March 1 to April 15, book two weeks ahead. We need the client's name, email and what the meeting is about.

CANCELLATIONS AND NO-SHOWS

Free to cancel or move up to 24 hours before. A missed appointment is $50, waived the first time.

PAYMENT

Card, bank transfer or check. Returns are paid before filing; monthly clients pay on the 1st.

GUARANTEES AND WARRANTIES

If we make an error on a return, we fix it free and pay any penalty and interest it caused. Letters about a return we prepared are answered free for a year.

Your policies

BOOKING: HOW FAR AHEAD, HOW TO BOOK, WHAT YOU NEED

CANCELLATIONS AND NO-SHOWS

PAYMENT: METHODS, WHEN DUE, DEPOSITS

GUARANTEES, WARRANTIES AND RETURNS

BEFORE YOU START

Safety, access, preparation.

SECTION 4 · TOP QUESTIONS

The 20 questions customers ask most

Write the answer you'd give and anything the AI must never say. Start with these, then add the ones from your inbox, reviews and call notes.

QUESTION	YOUR ANSWER	NEVER SAY
Example: Are you open on Saturdays?	From February to April 15, 9 a.m. to 1 p.m. by appointment. The rest of the year, weekdays only.	That we can see someone without an appointment.
Example: Will I get a refund this year?	Only the finished return can say; your preparer goes over it with you before you sign.	A refund amount, or that a refund is likely.
Example: Do you work with Xero?	Yes, Xero and QuickBooks Online, in your own account.	That we'll move your books to new software for free.
How much does it cost?		
How soon can you come?		
Do you work in my area?		
Are you licensed and insured? (if it applies)		
How long does it take?		
What do I need to do before you arrive?		
What payment methods do you take?		
What if I'm not happy?		

QUESTION	YOUR ANSWER	NEVER SAY

SECTION 5 · HOW THINGS GET DONE

Your processes, as numbered steps

Pick the processes a new hire asks about most. Write each the way you'd explain it standing next to them. Five is a good start.

PROCESS NAME

Starting a new tax client

WHO DOES IT, AND HOW OFTEN

Front desk; a few times a week, daily from February to April.

STEPS, IN ORDER

1. Check photo ID in person or on video. 2. Send the engagement letter and the client portal invite. 3. Send the document checklist for their kind of return. 4. Book the review once the documents are in. 5. Add the due date to the tracker.

COMMON MISTAKES

Accepting tax forms by email instead of the portal. Starting work before the engagement letter is signed.

PROCESS 1: NAME

WHO DOES IT, AND HOW OFTEN

STEPS, IN ORDER (ONE PER LINE)

COMMON MISTAKES, AND HOW TO AVOID THEM

PROCESS 2: NAME

WHO DOES IT, AND HOW OFTEN

STEPS, IN ORDER (ONE PER LINE)

COMMON MISTAKES, AND HOW TO AVOID THEM

PROCESS 3: NAME

WHO DOES IT, AND HOW OFTEN

STEPS, IN ORDER (ONE PER LINE)

COMMON MISTAKES, AND HOW TO AVOID THEM

SECTION 6 · HOW YOU TALK, AND WHEN A PERSON TAKES OVER

Your voice, and your limits

WORDS YOU USE WITH CUSTOMERS

"Client", not "customer". "Review", not "consultation". We say "Happy to help".

PROMISES THE AI MUST NEVER MAKE

Refund amounts, that a deduction is allowed, that an IRS problem will go away, or a price for catch-up work before the review.

QUESTIONS THE AI SHOULD NEVER ANSWER

Whether something is deductible, IRS and state letters, billing disputes, and anything about another client.

WHAT COUNTS AS URGENT, AND WHO TO CONTACT

A letter with a deadline in the next 10 days, or a call or text claiming to be the IRS. Tell the office manager the same day.

WORDS YOU USE, AND WORDS TO AVOID

PROMISES THE AI MUST NEVER MAKE

QUESTIONS THE AI SHOULD NEVER ANSWER

WHAT COUNTS AS URGENT, AND WHO TO CONTACT

SECTION 7 · KEEPING IT CURRENT

One owner checks it every month

WHO OWNS THE KNOWLEDGE PACK

Luis, office manager.

WHEN IT'S CHECKED

First Monday of each month, 15 minutes.

WHO OWNS THE KNOWLEDGE PACK

WHEN IT'S CHECKED

LAST UPDATED (DATE)

Before you load it

- [ ] Every service your team quotes is in section 2, with what changes the price.
- [ ] Section 4 has at least 20 questions, including the awkward ones.
- [ ] Every "hand off to a person" rule names who, and how to reach them.
- [ ] Nothing in the file is a customer's name, a card number, a password or a health detail.
- [ ] Someone who doesn't work here could read it and answer a customer correctly.

Save it as one file. When every section is filled in, save the workbook as one Word or PDF file named "[Business name] business knowledge". That file is what you load into each tool (see the load guide).