

AI for SMEs: Robot Brain, Human Heart

Smarter workflows. Stronger relationships.



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AI for SMEs: Robot Brain, Human Heart

Adrian Markey:

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We've embraced AI to run our practice more efficiently, not less humanly.

This talk is about real tools, real impact — and where empathy still matters most.



The AI Opportunity for Small Business



Accessible Now

AI adoption isn't just for tech giants — SMEs can leverage powerful tools immediately.



Think Automation

Save time, and empower people. Enhance capabilities rather than replace staff.



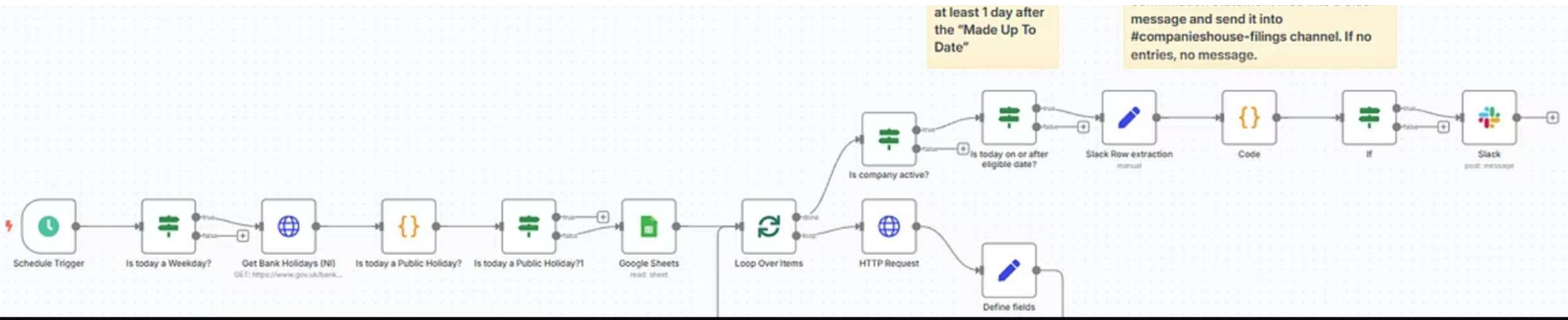
Practical Applications

No hype — just real-world implementation in an actual small business.

**Automate what you can;
Systemise what you can't.**

Here are a few examples of how we are using AI & automation in our firm...





Confirmation Statement Reminder System

Data Integration

Google Sheets + Companies House API + Slack create a powerful workflow.

AI Summarisation

Clients whose confirmation statement date has now passed are pulled from Companies House website and a message drafted to all team members in Slack

Daily Updates

Reminders sent daily until the return is filed.



Client Onboarding AI Workflow



Form Submission

Client fills out our on-boarding form.



Automatic Setup

Creates folder (network drive), job card (XPM & Trello), and creates a CSV to import into TaxCalc.



Compliance Alert

Slack notification when ID/AML docs received — simple but compliant.



Client Experience unchanged

The client is filling out the same form they always did. We are now just saving around 1-2 hours per client setup.

Telegram Bot: Handling Payroll with a Personal Touch

Purpose-Built for Repetition

- Automates recurring weekly payroll requests in client Telegram groups.
- Sends friendly reminders every Monday morning — no more chasing.
- Frees up time without losing visibility or control.

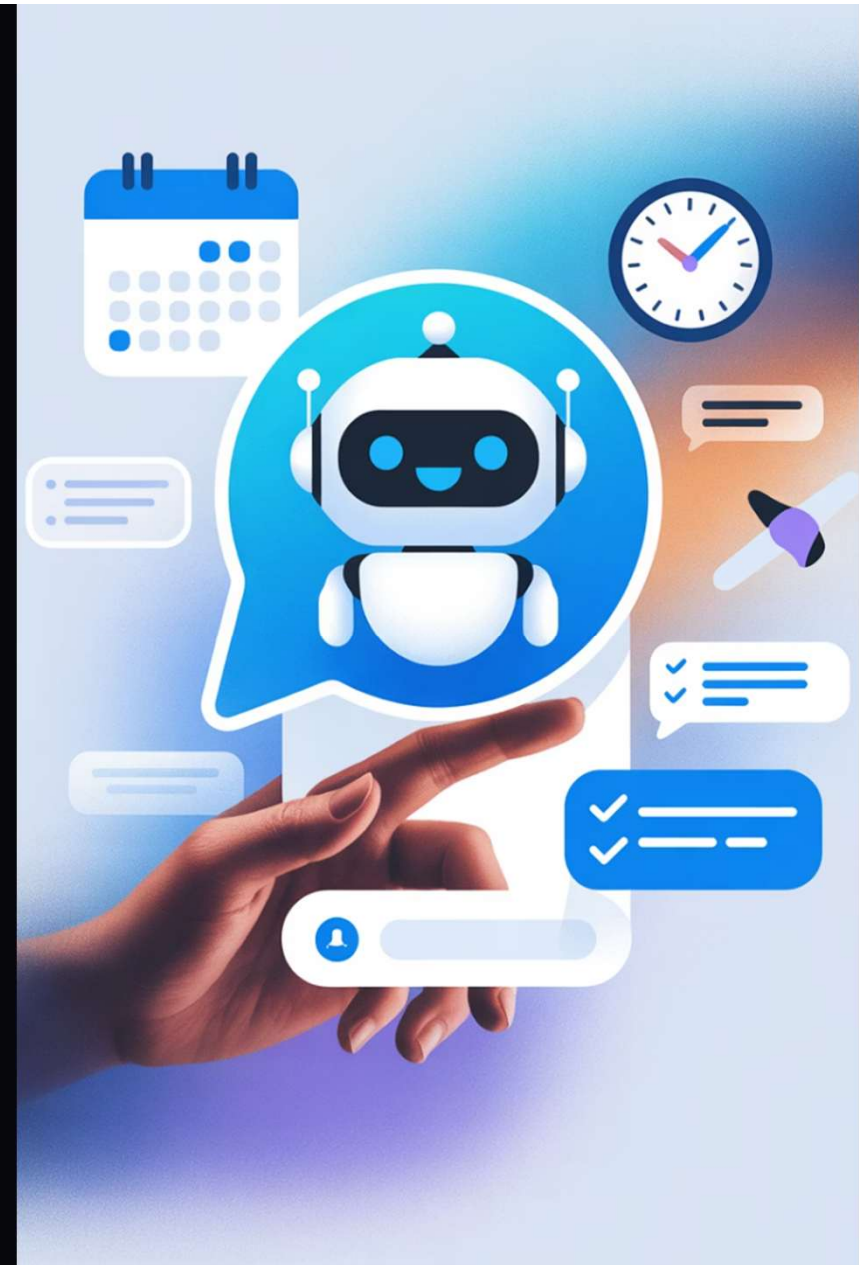
AI-Enhanced, Context-Aware

- Integrates ChatGPT to vary message tone and wording.
- Can adjust for context — e.g., UK bank holidays, client-specific quirks.
- Never sounds robotic; always feels personal.

Human-Guided Automation

- Bot operates within strict, pre-defined boundaries.
- Maintains client trust while saving cognitive bandwidth.

Weekly Payroll Hours admin
Alright there! It's yer payroll bot pal here — just poppin' in to ask for your hours 🕒
I'd do it myself but, yknow... no arms, just vibes and binary 🤖
Adrian's watching, so help a bot out before he swaps me for a toaster!
Cheers! 00:01



Future plans and what is possible

With automation platforms like n8n, Zapier, Make and Flowise, almost anything is possible. At best entire workflows can be automated. At worst, time can be shaved off many repetitive processes.

Marketing application

- Weekly brainstorming happens automatically and is presented for inspiration
- Content and images can be drafted
- One-click approvals which lead to posting

It is absolutely possible to fully automate a weekly social media plan - from drafting, to posting, to responding to comments.

It is absolutely possible to automate entire businesses! Content platforms, t-shirts, merch etc.

Predictive Workflow Prioritiser



Tax Return Explainer Bot

Technical to Simple

- Converts PoA and SA302 into clear, understandable language.
- Explains tax calculations in terms clients actually comprehend.

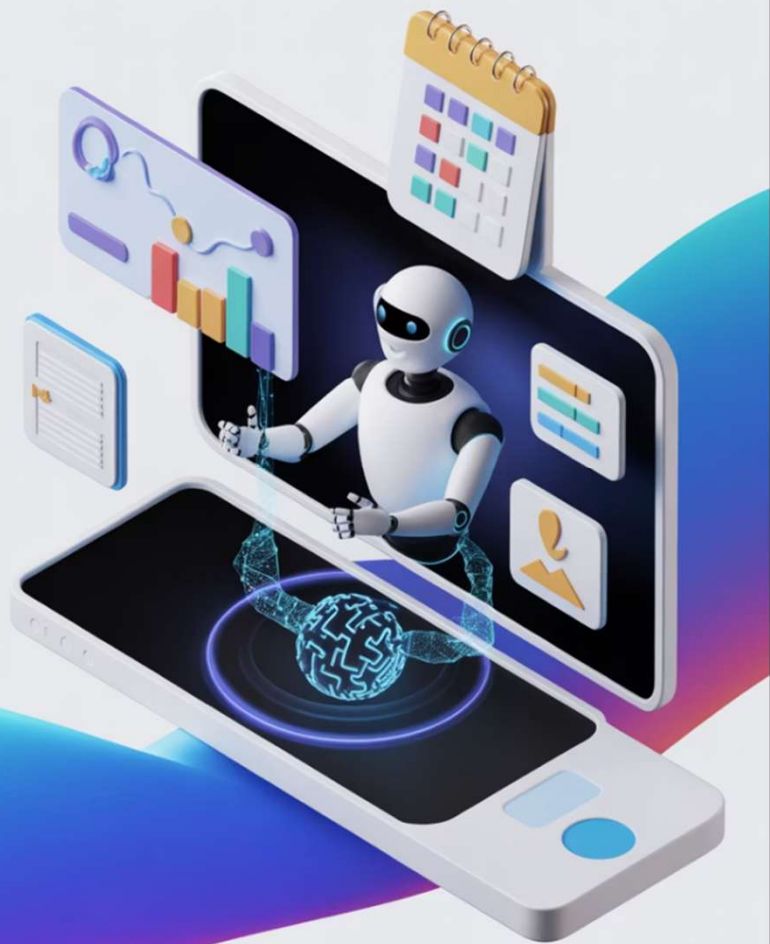
Personalised Approach

- Tailored tone matches individual client communication preferences.
- Structured properly with clear sections and explanations.
- This is an email I have written 100's of times so being able to automate it, saves dozens of hours every year.

Balance of Efficiency

- Frees mental bandwidth for accountants.
- Maintains personal connection through clear, helpful explanations.





AI Video Explainers for Clients



AI-Generated Content

Tools like Deepbrain convert text into professional video explanations.



Personal Avatar

Uses your voice or digital likeness for familiarity and brand consistency.



Create Once, Use Forever

Ideal for onboarding, FAQs, and deadline explanations.



Always Available

"Feels like me" even when I'm unavailable or after hours.



Delphi.ai

A platform you can use to create an AI clone of yourself.

If AI can do all that, what do you need me for?

AI is here to act as your assistant; to offload tasks and thinking elsewhere, to free you up for the more meaningful work.



AI is not going to take your job; it's going to take your tasks.

Businesses are built on personal relationships. Empathy matters



Why Empathy Builds Business

What is it?

- The ability to understand your client's emotions, not just their words
- Responding in a way that shows care, not just logic.
- Acting with their emotional context in mind.

Why it matters

- Clients don't remember what you said — they remember how you made them feel
- Builds trust, deepens relationships, and diffuses conflict
- Sets you apart in a world where automated responses are everywhere

The Human Advantage

- AI can automate delivery
- **Only humans can deliver with empathy**

71%

Emotional Memory

People remember feelings, more than details of interactions

When AI Gets It (Very) Wrong

1 "Cut costs now"

- AI solution: Fire all staff and outsource everything
- Why it's wrong: Ignores morale, quality, and trust
- What a human does: Balances cost with culture and care

3 "Focus on top clients"

- AI solution: Ghosts low-revenue clients
- Why it's wrong: Sees value only in numbers
- What a human does: Supports loyal clients and sees future potential

2 "Send all overdue reminders"

- AI solution: Cold email sent to a grieving client
- Why it's wrong: Emotionally tone-deaf
- What a human does: Pauses, checks in, responds with empathy



AI understands the *rule*.

Humans understand the *room*.

EQ>IQ

AI's lack of Emotional Intelligence highlights where human strength lies.

Where the Two Meet: A Balanced Approach

AI Strengths

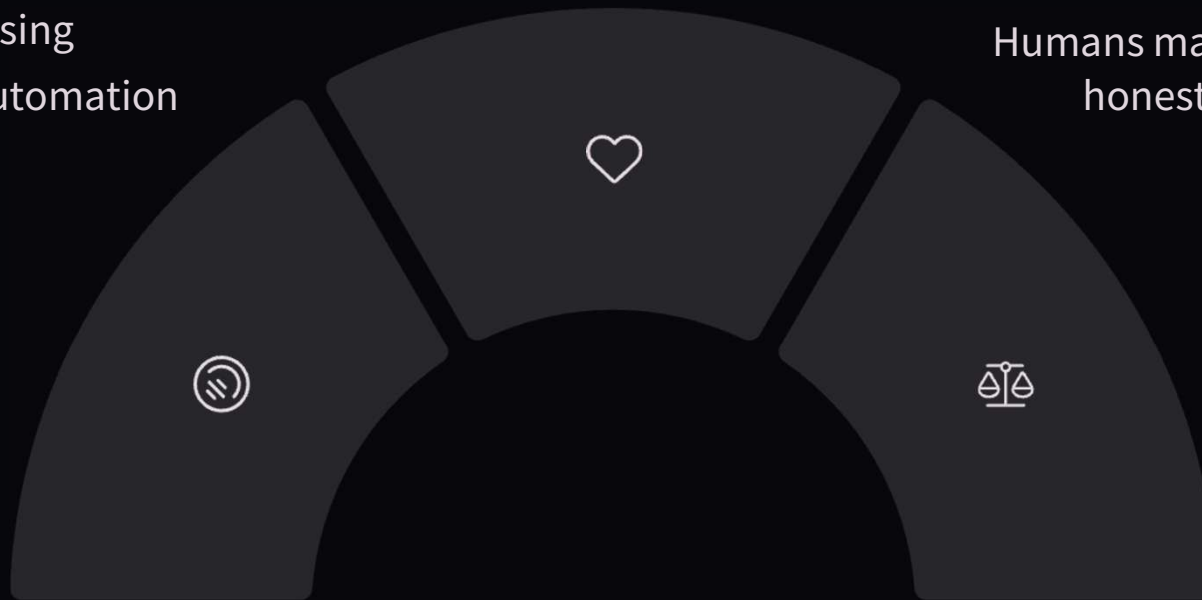
- Repetitive tasks
- Data processing
- Workflow automation

Human Strengths

- Emotional understanding
- Building trust
- Complex judgement

Perfect Balance

AI handles the brain work—
prompts, workflows, reminders.
Humans manage the heart work—
honesty, trust, emotion.

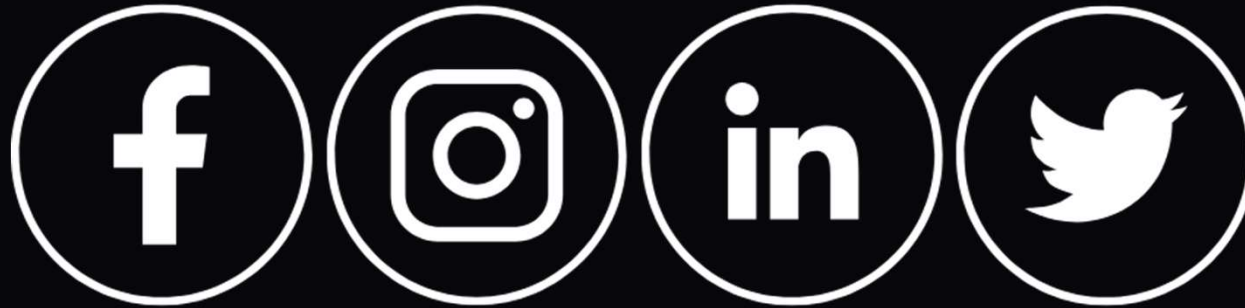


Could AI handle...?

Where Automation Ends, Empathy Begins



Thank You



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