

AI-assisted personal-tax preparation

Anonymised UK accountancy group | Process definition, integration requirements and delivery assurance

£3 -> £0.42

REPORTED UNIT PROCESS COST

Approx. 86% lower

P60 / P11D

DOCUMENT INPUTS

Dividend statements + emails

CCH

CORE INTEGRATION

Power Apps + Dataverse + Boomi

Operational challenge

- Client information arrived through forms and email and had to be translated into structured data for the central accounting platform.
- The workflow crossed document extraction, human review, Power Platform, Dataverse, APIs and CCH, creating multiple control and failure points.
- Qualified professionals needed confidence that automation would support rather than replace technical tax judgement.

What Leania did

- Defined the current process and produced detailed process-definition and data-mapping artefacts.
- Specified extraction flows, LLM prompt inputs and API requirements across Power Apps, Dataverse, Boomi and CCH.
- Designed detailed test scripts, performed testing and managed the UAT team.
- Worked with SMEs, solution architecture and third parties to agree requirements, SLAs and acceptance expectations.

Outcome and evidence

- The engagement reported a reduction in unit process cost from £3 to £0.42 per return.
- The delivered workflow linked source documents to structured data, human review and the central CCH record.
- Cashable savings and attribution would require client-finance confirmation.

What this demonstrates

- Process economics established before technology choice.
- Technically literate delivery leadership without claiming personal software engineering.
- Human judgement, controls and end-to-end acceptance designed into the workflow.

EVIDENCE CLASSIFICATION

Status: practitioner-reported

Metric classes: operational performance

Hold until owner confirms contractual confidentiality and recognisability review.