SALESEDGE FIELD GUIDE / ENGLISH EDITION

CHATGPT FOR PROFESSIONAL PRACTICES

A reviewed workflow for accountants, lawyers and consultants.

READ / APPLY / REVIEW

Complete English guide + editable source text.

Individual personal and professional use.

FIELD GUIDE / ENGLISH EDITION

CHATGPT FOR PROFESSIONAL PRACTICES

Use bounded drafting and source review for client communication, documents and practice workflows.

SUPPORT THE PROFESSIONAL, PRESERVE THE RESPONSIBILITY

Professional practices handle complex documents, recurring communications and important client commitments. ChatGPT can help organise information and draft text, but it does not replace the competence, accountability or review of the responsible professional.

This guide focuses on preparation and drafting. It does not provide jurisdiction-specific legal or tax advice, certify a practice's privacy compliance or claim that AI performs better than a junior colleague. Start with a narrow task whose result you can check reliably.

Use synthetic material while learning. Before submitting real client information, confirm the practice's approved tool, account, data-handling arrangement and permissions. A useful prompt is not permission to upload a confidential document.

SIX TASKS TO EVALUATE

Initial document organisation. Ask for parties, topics, obligations, amounts, dates and questions, each tied to a page or section. Check the original document, including attachments and definitions. A missing clause in a summary may be important; a long context window does not guarantee complete reading.

Research planning. Use the tool to frame questions, identify terminology and organise material from verified sources. Check current authoritative sources for the relevant jurisdiction. Never rely on an invented citation or a plausible explanation as legal or tax authority.

Standard document drafts. Work from an approved template and explicit facts. Keep missing terms visible. A specialist reviews applicability, calculations, wording and commitments before signature or submission.

Plain-language explanations. Ask for a clearer version of approved technical content. Check that qualifications, conditions and uncertainty survive simplification. An accessible explanation must still mean the same thing.

Routine client communication. Draft updates, document requests and reminders from confirmed case status and dates. Verify the recipient, facts, attachments and required approval before sending.

Reports and dossiers. Organise multiple sources into a consistent structure with traceable references. Reconcile figures independently and distinguish facts, assumptions, professional conclusions and proposed next steps.