Norloch

What a training exercise looks like.

One real-shaped task from an accountancy practice, worked end to end: the job, the documents, the exact prompt, the output, and the checking routine. The firm, the client and the people are fictional. The method is what we teach.

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IN SHORT

A Norloch training exercise takes a task the team does every week, gives the tool the same documents a colleague would need, writes a prompt that forbids guessing, and then checks the output against the source before anything is sent. In this example an accountancy practice answers a client's year-end questions. The draft took under a minute; the check took two; the reply went out in three, instead of the fifteen it usually takes.

Step 1. The task

It's 9.40 on a Tuesday at Castlebrae Accountancy, a fictional six-person practice in Edinburgh. A client has emailed. Someone has to reply, and the answer is in a checklist the firm already has. Today this takes about fifteen minutes.

> Subject: Year end stuff??
>
> Hi Morag,
>
> Sorry, I know you sent something about this in September but I can't find it. What do you actually need from me for the year end? Is it the same as last year? Also I changed the van in July, does that matter, and do you need the receipts for the new laptop or is that too small to bother with.
>
> Also are you still doing the thing where you file it early for a discount?
>
> Cheers
> Dave
> Dunbar Plumbing & Heating Ltd

Step 2. What the tool is given

The same three things a new colleague would need. This is the part most people skip, and it's why their results are vague.

The firm's checklist (extract)

> Year-end checklist (limited companies), extract
>
> 1. Bank statements for the full year, all business accounts, PDF or CSV.
> 2. Sales invoices raised and purchase invoices received, if not already in the bookkeeping software.
> 3. Details of any asset bought or sold over £500: date, cost, what it replaced, how it was paid for.
> 4. Receipts for equipment over £250. Below that, a list is enough.
> 5. Loan or HP agreements started in the year.
> 6. Confirmation of any money the director took out that wasn't salary or dividends.
>
> Early-filing discount: 5% off the year-end fee if everything arrives within 6 weeks of the year end. This client's year end is 31 October, so the deadline is 12 December.

A previous reply, for the voice

Hi Dave,

Thanks for sending those over. One thing missing: the HP agreement for the mini digger. Can you forward it when you get a sec? Everything else is in and we'll crack on.

Morag

Step 3. The prompt

Note what it does: names the source, demands every question be answered in order, forbids invention, and gives the tool a way to say "I don't know".

Draft a reply to the email below from Dave at Dunbar Plumbing & Heating. Use the year-end checklist to answer his questions. Answer every question he asked, in the order he asked them. Where the checklist gives a threshold, state it. Tell him the early-filing deadline date. Match the tone of the previous reply from Morag: short, friendly, no jargon, first names. Do not invent anything that is not in the checklist. If you are unsure, say "Morag to confirm" in square brackets rather than guessing. End with a one-line list of exactly what he needs to send.

[Dave's email, the checklist extract and the previous reply were pasted below the prompt.]

Step 4. The output, unedited

Hi Dave,

No problem, here's the list again. It's the same as last year with one addition because of the van.

What we need:
1. Bank statements for the full year (1 Nov to 31 Oct), all business accounts. PDF or CSV is fine.
2. Any sales or purchase invoices that aren't already in the software.
3. For the van: the date you changed it, what the new one cost, what happened to the old one (sold, part-exchanged, scrapped) and how you paid for it. If it's on finance, the agreement too.
4. The laptop: if it was over £250, send the receipt. If under, just tell me the amount and date.
5. A note of anything you took out of the company that wasn't salary or dividends.

Yes, the early-filing discount still applies: 5% off if everything's with us by 12 December.

In short: bank statements, any missing invoices, the van details and finance agreement, the laptop receipt, and a note of any drawings.

Morag

Step 5. The checking routine. Two minutes, every time.

1. **Every fact against the source.**
   The thresholds (£500, £250), the 5% and the 12 December date all appear in the checklist. Nothing was added. If the tool had written "10%" or "end of December", that is the moment you catch it, not the client.
2. **Every question answered.**
   Dave asked four things: what do you need, is it the same as last year, does the van matter, is the laptop worth bothering with, plus the discount. Five answers, in his order.
3. **Nothing invented.**
   The draft says the year runs 1 Nov to 31 Oct. The checklist only gives the year-end date. That's a reasonable inference, but it's the one line a reviewer should pause on. Here it's correct; the habit is what matters.

4 **Tone.**
First names, short lines, no "please find attached". Close enough to Morag that a client wouldn't notice. She'd probably cut "No problem".

5 **What went in.**
Dave's email contains no account numbers, UTRs or NI numbers, so it was safe to paste. If it had, those lines are removed first, every time. That rule is in the one-page policy the team leaves with.

Step 6. What changed

Fifteen minutes to three.
Morag cut one word and sent it. The time saved isn't the point on its own. It's that the reply was right, complete and consistent, which the fifteen-minute version often wasn't.

The checklist earns its keep.
The exercise only works because the firm has a written checklist. Half of what we do in a session is finding the documents a business already has and putting them where the tool can read them.

Then it becomes automation.
Once the team trusts this on year-end questions, the same prompt, checklist and voice sample can run on every inbound email, with a person still pressing send.

Try it on your own work

Sector	The task	The source document	The voice sample
Accountancy	Reply to a client's records or deadline question	Your checklist or engagement letter	A partner's previous reply
Trades	Reply to a quote enquiry with the right questions back	Your survey or quote form	A previous enquiry reply
Recruitment	Confirm a shift and chase a missing document	Your compliance checklist	A consultant's previous message
Any office	Turn a meeting transcript into actions with owners	The transcript	Your usual meeting-notes format

Free 30-minute call. Bring one task of this shape and we'll scope a session around it. hello@norloch.co.uk · norloch.co.uk/pricing