





FOLLOW-UPS ON AUTOPILOT. CONVERSATIONS THAT CONVERT.

How **Tax Window** partnered with **SMEC AI** to automate personalised follow-ups to save time, increase conversions, and elevate client experience.



RESULTS AT A GLANCE

	~2 hours saved per week Reclaimed from manual admin and reinvested into advisory work.
	Higher conversion rates Driven by follow-ups tailored to what clients actually need — at scale.
	Business as usual Zero disruption to daily operations.
	No new tech stack Custom automation built on existing systems.

CLIENT SNAPSHOT

Business: Tax Window
Industry: Tax & Accounting
Location: Victoria, AU
Business Size: Small

What they do:

Tax and accounting advisory services for individuals and small businesses.

"SMEC AI helped us build the custom workflow we actually needed to better serve our clients."

— **Artur Osadchiy**
Managing Director

BUSINESS CHALLENGE

Tax Window already knew personalised follow-ups worked. The problem? Scaling them. Before working with **SMEC AI**, follow-ups were:

- Manually copied and pasted between Word and email
- Template-driven, with limited personalisation
- Time-consuming and error-prone
- Frustrating for accountants and invisible to clients

"It was clunky, frustrating, and unsustainable day-to-day."

Despite best intentions, valuable advisory work was happening behind the scenes but clients weren't seeing or feeling it.

WHY SMEC AI?

Tax Window had already seen results from ad hoc AI — **more replies, stronger engagement, better conversions.**

But scaling this approach wasn't realistic without technical expertise.

"We knew personalisation worked. But scaling it meant more copying, more prompts, more tech — and our accountants aren't software engineers."

SMEC AI stepped in as a hands-on partner, bridging the gap between ambition and execution.



FOLLOW-UPS ON AUTOPILOT. REAL IMPACT, REAL RESULTS.

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THE SMEC AI APPROACH

SMEC AI took a problem-first, consultative approach, focused on real business outcomes – not flashy tools.

- Custom automation aligned to their workflow
- Built directly on their existing tech stack
- Delivered a proof of concept before rollout
- Hands-on support through live production

"SMEC AI didn't bring a cookie-cutter solution. They focused on real business value and tailored everything to what we actually needed."

IMPLEMENTATION EXPERIENCE

"This was by far the most seamless tech implementation I've been part of. It felt like a true partnership."

- No disruption to operations
- No new tools to learn
- No loss of control or quality
- Went live with confidence

Seamless & low risk

MORE THAN TIME SAVED

Commercial Impact

Clearer advisory value, stronger client responses

Client Experience

Clients now feel understood, supported, and confident in Tax Window's proactive advice.

Team Experience

Accountants are spending less time on admin and more time doing the work they love.

Deeper Value

Automation didn't remove the human touch – it amplified it.



"Take the leap — but do it with the right partner.

SMEC AI helps you identify high-value use cases and actually bring them to life."

— Artur Osadchiy
Managing Director



SCAN TO ACCESS FREE AI SUPPORT

This automation is ideal for lean SMEs and owner-operators juggling sales and delivery, struggling to scale personalised follow-ups, and losing valuable client conversations to manual admin.