



AI WHATSAPP ASSISTANT FOR FIRMS

Your client desk, **always** answering.

The one who answers every client, every time.

Document requests, bank confirmations, MoF and NSSF deadlines, audit queries, billing and new engagements, all handled in Arabic, English and French, 24 hours a day, on your own WhatsApp Business number.

BUILT FOR AUDIT & ACCOUNTING FIRMS

24/7 on WhatsApp Business

Arabic, English & French

Understands clients' voice notes

Confidential by design, role-based access

Live in 2 to 4 weeks

Flat monthly, nothing metered

MSPE

AI assistants for firms
Baabda, Lebanon · mspe.pro

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12 things it handles inside your firm

Every one of these runs on your existing WhatsApp Business number. No app for clients to download. No new system for your staff to log into.

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- 01**
Document requests to clients
Chases trial balance, bank statements, invoices or payroll files from each client, re-sends the request, confirms receipt and files the document under the right engagement.
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- 02**
Bank & counterparty confirmations
Year-end confirmations go out on time to the banks and counterparties on your list, replies are tracked, and the engagement partner sees who is still outstanding on one screen.
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- 03**
MoF, NSSF & VAT deadline reminders
Each client gets a reminder before their income tax, R10, R6, R3 and VAT deadline, with the documents they need to send. Fewer late filings and fewer last-minute calls.
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- 04**
Audit query intake & routing
A manager posts a query, the client answers on WhatsApp, the thread is attached to the audit file and routed to the engagement partner for sign-off. No lost email threads.
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- 05**
Billing & payment status
Outstanding fees, invoice copy, payment link, and the follow-up on overdue accounts, politely and consistently, without the partner having to chase the client personally.
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- 06**
New engagement intake
Prospect enquiries become a structured intake (entity, year, services needed, budget), logged in your CRM with the full chat, and routed to the right partner for the proposal.
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- 07**
Compliance circulars summarised
A new MoF or BDL circular lands, the assistant drafts a one-paragraph summary for the clients it affects, and the partner approves before it goes out.
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- 08**
Secure document delivery
Financial statements, audit reports, management letters delivered to the right contact on WhatsApp over an encrypted link, with the download tracked.
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- 09**
Appointment scheduling
Kick-off meetings, interim reviews, exit meetings and training sessions booked against each partner's live calendar, with reminders the day before.
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- 10**
Status enquiries ("where is my file?")
"Where is my audit?" "When will my VAT return be filed?" answered instantly from the file status, instead of pulling a manager off their work to answer.
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- 11**
Complaint & fee-dispute routing
Captured calmly, with the full history, and opened as a private ticket for the managing partner. Documented long before it becomes a formal complaint.
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- 12**
Confidential by design
Each client sees only their own file. Internal tools answer only to verified staff numbers. Every outgoing message passes a redaction filter. Full transcript archive for file review.
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A day inside your firm, with it on duty

This is what the office actually looks like once it is live.

06:30

DIASPORA

A client in London asks about his year-end filing

Pre-office hours in Beirut. The assistant confirms the filing date, lists the three documents still missing, and sends an encrypted upload link. The manager walks in to a file one step closer to ready.

09:00DOCUMENT
CHASE**15 missing-document requests go out at once**

Audit season. Each client gets a personalised list of what the engagement team still needs, with the deadline and an upload link. By noon, nine have replied. The engagement partner sees a live tracker instead of a chasing spreadsheet.

11:30BANK
CONFIRMATION**Bank confirmation received, filed to the engagement**

A bank replies on WhatsApp with the balance confirmation. The assistant attaches it to the right audit file, notifies the senior, and ticks it off the outstanding list without a staff member touching it.

13:00

DEADLINES

MoF R10 reminder goes to 48 clients

Three days before the deadline. Each affected client gets a reminder with the exact form and the documents the firm still needs from them. Four reply with their files on the spot.

15:30

INTAKE

A prospect enquires about an audit

Enquiry captured with entity, year, turnover range and reason for the audit. Logged in your CRM, routed to the partner who covers that sector, with a short proposal already drafted for her to review.

18:00

QUERY

Audit query from the manager to the client

Manager posts a query. The assistant forwards it to the client, keeps the thread tidy, and when the client replies the answer is attached to the audit working paper for the partner to sign.

21:00

FEE DISPUTE

A client disputes a fee

The message comes in angry. The assistant recognises the tone, does not argue, captures the dispute with the full chat history, and opens a private ticket for the managing partner. Documented long before it becomes a formal complaint.



What your firm gets

The assistant

- ✓ **Your own assistant**, trained on your service lines, deadlines, tone and name. Not a generic bot.
- ✓ **WhatsApp Business number** (new or your existing one), plus an optional chat bubble on your firm website.
- ✓ **Arabic, English & French**, including Lebanese dialect and clients' voice notes.
- ✓ **Connected to your systems**: engagement folders, CRM, time & billing, document store. We integrate where they live.
- ✓ **Partner approval built in**. Any outgoing document, summary or proposal waits for a named partner's one-tap sign-off.

The service around it

- ✓ **Weekly report**: documents chased, confirmations received, deadlines reminded, intakes captured, complaints routed.
- ✓ **Continuous tuning**: every unanswered question becomes an answer the following week.
- ✓ **Full transcript archive** for file review, regulatory inspection and quality-control standards.
- ✓ **Encrypted, role-based access**, with a redaction filter on outgoing messages, on infrastructure we back up and patch.
- ✓ **Named Lebanese support**: you call people you have met, in your time zone.

Built to work with your IT, not around it

Whoever runs your IT, in-house or outsourced, stays in charge of the firm's systems. We bring one service and plug it in where they tell us to.

Nothing to install

No new hardware, no server in your office, no software on staff machines.

Your IT approves the access

Read access to the folders they choose, revocable by them at any time.

We carry the running of it

Hosting, updates, monitoring and backups of the assistant are ours, not another job on their list.

Engineer to engineer

Your IT gets the integration documentation and a direct line to the engineer who built it.

Investment

One-time build fee plus a flat monthly service fee, priced against what one bookkeeping or admin FTE costs you every month, not per message and not per client. Nothing is metered, so a filing month does not produce a surprise bill. Exact quote after the 15-minute discovery call. We measure deflection on *your* numbers after 30 days and show you the report.

NEXT STEP · 15 MINUTES

See it chase a real document.

Book a short demo. Your assistant will chase a real missing document, capture a mock audit query and send a VAT deadline reminder, end to end, in front of you. No slides, no commitment, and you will know within fifteen minutes whether this fits your firm.

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