

# Advisory firm modernisation — scope summary (anonymised)

Forward this to a partner, compliance officer or developer. **Client anonymised** — described only as a Rotterdam accounting office.  
Status: **in delivery**. No fabricated outcomes.

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## Client context (anonymised)

A **Rotterdam accounting office** with a strong professional offer but:

- An outdated website that does not reflect their expertise
- No structured lead capture — enquiries lost or handled ad hoc
- No digital assistant to qualify incoming questions before a human follows up
- Content production dependent on one person, with no approval pipeline

**This document does not name the client.** Public materials use only this generic description.

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## Programme scope — three integrated systems

### 1. Web upgrade & lead capture

Element	What it delivers
<b>Modern site</b>	Mobile-first, professional presentation aligned with advisory positioning
<b>Lead capture</b>	Structured enquiry forms — not a generic contact box
<b>Clear pathways</b>	Visitor understands what the firm does and how to start a conversation
<b>Foundation for AI</b>	Site architecture ready for an embedded qualification layer

### 2. Lead-qualifying AI assistant

**Qualification only — no tax advice.** This is a hard boundary, not a disclaimer buried in small print.

Element	What it delivers
<b>Intent routing</b>	Classifies enquiry type (new client, existing, general topic)
<b>Structured intake</b>	Collects only what is needed to qualify — not sensitive tax records
<b>Guardrails</b>	Assistant cannot provide tax, legal or financial advice
<b>Human handoff</b>	Qualified lead passed to a human adviser with full context
<b>Approval gate</b>	Nothing the assistant says is published or sent without review during setup

#### What the assistant does NOT do:

- Answer tax questions or interpret legislation
- Access client financial records or filings
- Replace a qualified accountant or adviser
- Send messages without human oversight during rollout

### 3. Human-approved content engine

Element	What it delivers
<b>Draft pipeline</b>	AI-assisted drafts for articles, updates, newsletters

<b>Human approval</b>	Every piece reviewed and signed off before publish
<b>Tone consistency</b>	Aligned with firm voice — not generic AI copy
<b>Audit trail</b>	Who approved what, when — available on request

Topic brief → AI draft → human review → edit → approve → publish  
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 nothing publishes without this gate

## Security & compliance layer (summary)

Full detail in the separate **AVG / data-processing** sheet. At scope level:

- **Verwerkersovereenkomst (AVG)** signed before processing personal data
- **Data minimisation** — assistant collects enquiry metadata, not client dossiers
- **EU hosting** — databases and processing within the EU
- **Service accounts** — scoped access, no passwords over chat
- **Revocable access** — client removes permissions in their own admin panel

*This scope summary is not legal advice. Final agreements are reviewed with the client's own counsel where required.*

## Delivery approach — staged, no fake dates

Work proceeds in **six phases** (timeline diagram available as separate download). Phases are sequential; each ends with a sign-off gate before the next begins.

Phase	Focus	Gate
<b>01 Map &amp; scope</b>	Automation Map, scope lock, AVG requirements	Signed scope document
<b>02 Web foundation</b>	Site structure, lead capture, mobile UX	Client review of staging
<b>03 Qualification assistant</b>	AI intake, guardrails, no-tax-advice rules	Test scenarios + sign-off
<b>04 Content engine</b>	Draft → approve → publish pipeline	First approved piece live
<b>05 Security &amp; AVG</b>	Data-processing agreement, access model	AVG signed, access scoped
<b>06 Verify &amp; handover</b>	UAT, documentation, optional care plan	Client sign-off

**Status today:** full scope designed, security & AVG layer specified, staged delivery in progress. Outcomes will be reported once live — no invented metrics until then.

## What success looks like (qualitative — not yet measured)

- Visitors can understand the offer and start a qualified enquiry without a phone call
- Incoming questions are routed and structured before a human adviser spends time
- Content can be produced faster — but only with human approval on every publish
- Data handling is documented, agreed and auditable under AVG

## Next step

Considering a similar programme for your advisory or professional services firm? Book a paid **Automation Map** — we score whether web + assistant + content is the right first build, or something simpler gets you there faster.

**Book:** [services.flexgrafik.nl/book-discovery/](https://services.flexgrafik.nl/book-discovery/)

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Norbert — AI Systems Architect · Quietforge · [hello@flexgrafik.nl](mailto:hello@flexgrafik.nl)