



How a CPA Firm Grows with Clients Using AI Auditing

JCAATs Professional Services Case Study



Previously, auditing three months of sales data took a team of 3-4 people two full days. With JCAATs AI software, we now audit a year's data across 130+ product types in just four and a half minutes, delivering results that clients find highly satisfactory.

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Chung Shi CPA Firm in Taiwan faces the challenge of growing alongside clients while retaining them amidst competition from larger firms. Over a decade ago, we introduced computer audit software, beginning with ACL, though it wasn't very successful. In 2023, with JACKSOFT's new AI audit software, JCAATs, we revitalized our digital transformation efforts by collaborating with clients to integrate their ERP systems into our audit processes.

Application of JCAATs :

Chung Shi and its clients jointly adopted JCAATs AI auditing software to enhance internal and external audit processes for digitally transforming clients. By transferring audit techniques and programs, we empowered clients to strengthen internal controls and build a foundation for IPO readiness. Our value-added consulting approach not only strengthened relationships but also helped clients achieve their succession planning goals.

Challenges: Building Competitive Differentiation

To drive growth and retain clients, Chung Shi's strategy focused on establishing a unique market position and delivering exceptional client value. We specialize in audit services for growing small to medium-sized enterprises (SMEs) that often lack the necessary expertise. Partnering with our clients in a shared learning journey became the foundation for long-term collaboration.

With gratitude to JACKSOFT's CEO Sherry Huang for organizing a three-day training course on JCAATs, the AI audit software, both Chung Shi and our clients successfully mastered the software, passed the ICCP certification exam, and completed the pilot project. We then continued to work closely with our clients to define audit topics for data and predictive analysis, consistently practicing and refining our approach with unwavering determination to succeed. I will now share the impressive results we've achieved in this short time.



“With JCAATS’ robust analysis, our auditors quickly detect anomalies and deliver targeted recommendations, earning client trust.”

Solution: Integrating Technology into Internal Audit and Control

Flour Manufacturing Company: This company, which produces more than 134 products, previously needed a project team to sample and audit three months of sales data over two days. With JCAATs AI auditing software, we efficiently extracted data from electronic invoices and POS systems, enabling us to audit a full year’s data in just four and a half minutes. This rapid analysis identified six posting errors, leading the client to adopt our audit program for more accurate pre-filing reviews.

Hand Tool Manufacturing Company: We’ve supported this company since its early days, helping to plan its growth strategy. As the business expanded and implemented a well-known ERP system, internal control issues emerged due to limited IT manpower and insufficient training. Through JCAATs, we conducted cybersecurity audits and implemented system segregation of duties (SOD) audit, ultimately helping the company achieve ISO 27001 certification for information security management.

“While the journey has been challenging, it’s been incredibly rewarding to witness our clients’ ongoing progress and growth.”



Results

The implementation of JCAATS software enabled Chung Shi to establish a computer auditing team that supports both internal auditors and clients. We streamlined audit processes by minimizing redundancy, detecting errors, and strengthening internal controls, thereby reducing clients' risk exposure. With JACKSOFT’s ongoing self-study training, we shifted from traditional sampling to 100% data inspection, focusing on high-risk transactions. The software standardized audit procedures and reports, boosting efficiency. Leveraging JCAATS' robust analysis capabilities, our auditors can swiftly identify anomalies and provide targeted recommendations, earning our clients' trust.

In a highly competitive accounting industry, growing alongside our clients has ensured none have left due to service gaps. While the journey has been challenging, it’s been incredibly rewarding to witness our clients' ongoing progress and growth.

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