Not Quite Unicorns

Start here

The Month-End Engine

Six skills for Claude and Microsoft Copilot that write the first draft of month-end. Your team checks every draft before anything goes to a client.

22 files · About 15 minutes to set up

notquiteunicorns.com/free/month-end-engine

What's in the pack

Six skills and the files to run them

skills/records-chaser/

Records chaser

Checks which clients still have missing records and drafts each reminder for your team to send.

skills/numbers-checker/

Numbers checker

Reads this month's and last month's exported Xero reports and flags lines that look off.

skills/pack-drafter/

Pack drafter

Writes the management pack commentary in your firm's house style.

skills/review-prepper/

Review prepper

Turns the month's notes into a one-page Monday brief built around the 3 decisions a partner needs to make.

skills/process-writer/

Process writer

Interviews your best senior and writes down how they run month-end on one page.

skills/next-task-spotter/

Next-task spotter

Scores your other admin by how often it runs, how long it takes and how much your team dislikes it.

Also in the folder

`orchestrator/month-end-project.md`

Runs all six skills in order and stops after each one so your team can check the output.

`setup-guides/`

One setup page per skill, with steps for Claude and Microsoft Copilot.

`claude-upload/`

Six zip files you can upload straight into Claude Skills.

`templates/`

The records tracker and task list CSV files.

Setup

Set up in about 15 minutes

Set the skills up once in Claude or Microsoft Copilot. After that, you run each one with a single line.

Step 01

Install the first skill

Open setup-guides/01-records-chaser-setup.md and follow the steps for Claude or Copilot. The other five use the same steps.

In Claude, upload claude-upload/*.zip directly

Step 02

Run all six from one Project

If you use Claude, create a Project called Month-End Engine and paste in orchestrator/month-end-project.md so one chat runs the whole month.

Optional · You check each step before the next runs

Step 03

Fill in this month's tracker

Open templates/records-tracker.csv and list your clients and any records you're still waiting on.

You're ready for your next month-end

How to run it

Your first month-end

Run steps 01 to 04 each month, and 05 and 06 once a quarter.

01 Records chaser

Attach records-tracker.csv. Your team reads each draft reminder and sends it.

02 Numbers checker

Once a client's records are in, export this month's and last month's Xero reports and attach them.

03 Pack drafter

Attach the checked figures and last month's management pack so the commentary matches your house style.

04 Review prepper

Attach the outputs from steps 01 to 03. The partner gets one page and 3 decisions.

05 Process writer

Run once with your best senior so their month-end method lives on one page.

06 Next-task spotter

Run after month-end with templates/task-list.csv to pick which admin job to hand over next.

Before you attach client files

These skills read the reports you export from Xero, QuickBooks, Sage or IRIS and never log into your ledger. Use the paid business Claude or Copilot account your firm has approved for client work, follow your firm's AI policy, and have someone on your team sign off every draft.

Not Quite Unicorns

Built by Not Quite Unicorns

Want month-end connected to your firm's tools?

We connect Xero, Outlook and your practice software so your team spends less time exporting reports and chasing records. Book a free 30-minute intro call with George.

Book a free intro call →

notquiteunicorns.com/start?type=ai