Opportunities and Challenges of Integrating AI Tools in Accounting Software

Research Protocol

Synopsis:

The aim of this study is to understand accountants needs and wants from the performance of this accounting software. Information regarding accountants' attitudes and understanding of AI tools will also be explored to better understand how the integration of these features can be done without compromising the efficiency and accuracy of accounting tasks. With the analysis of the interview transcripts, user interface designs will be developed and further tested by participants to gauge their usability.

Participants:

Participants will be a range of small to medium business owners or accountants/bookkeepers that have knowledge and experience with accounting software.

Tasks:

Participants will be invited to take part in an interview initially to gather data about their needs and preferences in accounting software, along with any comments or concerns about Ai being included in future software. Later they will be asked to return for usability testing of high fidelity Ui screens.

Time:

Interviews are anticipated to last 45-60 minutes.

Usability testing will be an additional 30-45 minutes several weeks later.

Interview Script:

Are you okay with this interview being recorded?

Hit record

"Hello and thank you for taking part in the conversation about Ai and accounting software. My name is Annie, I am a Masters student at Newcastle University studying User Experience Design. The purpose of this study is to identify the opportunities and challenges of integrating AI tools in accounting software. I am really appreciative of your participation! With insights from our conversation, I hope to find solutions to making the kind of systems you work with more intuitive and effective. There will be around 30 questions in this interview. If there's any questions you do not wish to answer, simply say pass. If for any reason you wish the interview to end early please let me know and we can end at any time. Do you have any comments, questions or concerns before we get started?

Okay, then let's begin!"

Rapport/ Experience

1. Tell me a little about yourself and what it is that you do?
2. What does a typical day of work look like for you?
3. What aspects of your job take up the most time?
4. What is your favorite part about your job?
5. What is your least favorite part about your job?

Software

6. How long have you been using accounting software and what different software have you used? *(make sure you get what software they are currently using as well)*
7. What has your experience with accounting software been like? (And why?)
8. What are some of the major changes you've seen and how do you see it changing in the future?
9. What do you like and dislike about the current software you use?
10. Thinking about the design and categorization of your current software, what do you like or dislike about it? Is there anything you would personally like to change?

Task Management

11. On the software you use currently, where do you spend the majority of your time?

12. How do you decide what you will do first?

13. How do you prioritize your tasks and do you use any tools to help you with this?

14. How do you think your workflow may differ from other accountants you work with?

Ai

15. On a scale of 1-10 how much do you trust AI? (1 being you have no trust for it and 10 is complete trust)

16. Can you elaborate on your feelings towards Ai? *Why do you trust or distrust it?

17. What could help resolve some of those feelings? For example is there information you would like to see to know it is doing its job correctly? * (*if they distrust it*)

18. How do you think AI can help you with your accounting tasks?

Sage Demo

We're now going to take a look at a 4-5 minute demo of Sages new AI-copilot.

As the demo plays I would like you to describe the task you see being performed and indicate whether you find it confusing or helpful and with a brief description why.

If you have any questions or would like me to pause so you can give in depth opinions please say pause.

Sage Ui Screens

Before I press play can you identify →

19. Where to access the AI assistant?

*Play Demo

20. After having watched it, how likely are you to use this copilot on a scale of 1-10 (1 not likely) and why?

21. Do you think this tool will save you time? Please elaborate.

22. Are there any features or improvements that would make you more likely to adopt Sage Copilot?

23. Design wise, how do you feel about the placement of the AI-copilot?

24. Can you provide any insight on how the AI window remaining open as you move to other pages, could be helpful and/or hindering?

25. Do you think having a permanent AI window open with insights would be helpful or distracting? Why or why not?

26. What information would you like to see from the AI Insights?

27. Do you foresee any problems arising from the AI insights?

28. How do you prefer to receive notifications? And why?

    a. Pop up

    b. Sound

    c. Both

29. How can you see your responsibilities changing in the future and how do you think AI will help with that?

30. Is there any other insight you would like to address about the Ai-Copilot before the completion of this interview?

Process:

Participants will be invited through Sage by email. They will be given an invitation to join in-person or via Microsoft Teams. Microsoft Teams will be used for recording and generating a transcript that can later be used to analyze data.

Ethics:

The names and other inessential but personal information about the participants will not be recorded and used in the report. Participants will be given a number and be referred to that when referenced in the report. Any personal data said during the interview will be removed from the transcript.

Data Analyzing Strategy:

Thematic analysis will be used to find recurring themes like problems or anticipated challenges and opportunities.