

An accounting firm's AI policy still named a platform the firm was leaving behind, while staff had already moved on to a new one. **The policy didn't need a rewrite. It needed to catch up.**

The Challenge

The firm's AI policy was written around a previously approved AI platform. As staff started working in Claude, the policy stopped describing the tools people actually used.

For an accounting firm, that gap is real exposure. Client tax IDs, Social Security numbers, and bank routing numbers move through the office every day, and a policy that points at the wrong tool can't tell anyone what's allowed in the right one.

Even among organizations that have an AI governance policy, only **34%** regularly audit for unsanctioned AI use.¹

The Solution

MSI recommended updating the policy in place instead of starting over. The structure was sound. It needed the right approved platform, explicit limits on the firm's most sensitive client data, and a review cycle short enough to keep up with AI.

The firm licensed a Claude Team organization it owns, with admin access for MSI and single sign-on and Microsoft 365 integration handled by MSI's technical team. The revised policy names Claude as approved and bars SSNs, routing numbers, and tax IDs from AI tools.

A small AI committee now reviews the policy every quarter with MSI's AI team, which fits a firm this size better than an annual rewrite nobody gets to.

Engagement Snapshot

CLIENT	Regional Accounting Firm
INDUSTRY	Accounting & CPA Services
RELATIONSHIP	Monthly AI Strategy Program
DELIVERED IN	Summer to Fall 2026

By the Numbers

34% of organizations with an AI governance policy regularly audit for unsanctioned AI use.¹

5 licensed seats in an AI organization the firm owns, with MSI holding admin access for support.

The Results

The policy now matches the platform staff use, names the client data that never goes into an AI tool, and has a standing committee to revisit it each quarter. Integration with the firm's document management system is next.

"An AI policy written for last year's tools protects nobody. If yours names a platform your staff no longer use, MSI can bring it current and keep it that way."

¹ IBM, Cost of a Data Breach Report 2025, research conducted by Ponemon Institute; IBM press release, July 30, 2025.