

# Customer Story & Expert Interview

*AI Audit Software Company*

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A long-form customer story, written from a recorded discovery call, on how a partner at one of the twenty largest US accounting firms uses AI to examine every transaction in an external audit.

## SCOPE OF ENGAGEMENT

Transcript Analysis · Story Structure · Long-Form Customer Story · Quote Shaping · Annotated Transcript

## THE BRIEF

## An Expert Interview That Needed a Story

In October 2020 a company selling AI software for external audits asked me to write a customer story from a recorded discovery call with one of its clients: a partner in the risk and advisory practice of one of the twenty largest accounting firms in the US, a firm with more than 3,000 staff across 27 offices. The model was an earlier story the company had published about another top-20 firm, and the new piece was to match its tone and structure.

| CLIENT                    | MARKET                               | SCOPE                                 | ENGAGEMENT                                       |
|---------------------------|--------------------------------------|---------------------------------------|--------------------------------------------------|
| AI audit software company | Accounting and audit firms in the US | Customer story from a call transcript | One commission, October 2020, capped at 12 hours |

## THE CHALLENGE

The transcript was a conversation, not a story. The partner knew his subject and spoke well, but his points came in the order the call took them, with the asides and restarts of live speech. Read straight, it would have been hard to follow and harder to quote. The piece also had a balance to strike. It was the software company's story, but its credibility rested on the partner, and an account that made the software sound as if it did his job for him would have served neither of them. The readers were auditors and finance leaders, who know the work well enough to spot an overclaim.

## MY ROLE

I read the full transcript and wrote back to the client with a proposed structure and four themes before drafting a word, so the shape was agreed up front. Once the draft was under way, I recommended a shorter piece than I had first quoted, about 1,700 words instead of 2,000 to 2,300, because the material didn't need more and padding would have weakened it. I delivered the finished story with an annotated copy of the transcript showing where every quote came from.

## THE CORE INSIGHT

The strongest argument for the software was the partner's own judgement. AI that sifts every transaction is only worth something if a skilled auditor knows what to do with what it finds. So the story was built on his expertise, with the software as the thing that extends it: the data allowed to speak for itself, and an experienced team deciding what it means.

## KEY DELIVERABLES

# From Transcript to Customer Story

The transcript held the substance. The work was finding its order and putting it into the partner's voice without changing what he meant.

## DELIVERABLES

## 01 Themes and Structure

Before drafting, I proposed four themes for the client to approve: letting the data tell its own story instead of starting from a hypothesis; surfacing insights a conventional audit would miss; catching small frauds and the systemic failings behind them; and a new kind of best practice, sold on its practical value more than its novelty.

## 02 The Customer Story

About 1,660 words in five sections: the data telling its own story; a dashboard clients could follow; the needle in the haystack, on small frauds that point to larger ones; making time count, on the true cost of an audit and the speed of onboarding a new client; and the future of the profession, with continuous auditing in place of the annual check.

## 03 Shaped Quotes

I paraphrased the partner's spoken remarks into readable quotes and joined them with bridging sentences, giving the piece the conversational flow the transcript lacked while keeping to the substance and tone of what he said. I noted that he would need to confirm the wording before publication, and offered any changes he asked for free of charge.

## 04 Annotated Transcript

A copy of the transcript marked up to show the source of every quote, so the client and the partner could check each paraphrase against the original in minutes instead of rereading the whole call.

## WORKING METHOD

## Writing for Readers Who Know the Work

The draft went to the client with a short note on the choices made. Some were about the story; some were about keeping it honest.

## JUDGEMENT CALLS

- Led with the partner's competence and that of his team, and presented the software as augmenting it.
- Kept his sharpest lines in his own idiom: "If you're looking for a needle in the haystack, then you'd better bring a metal detector."
- Grounded each claim in concrete detail, such as combing through 750,000 separate transactions to find the anomaly that needed flagging.
- Recommended a shorter length once the draft showed what the material would bear.

## CHECKS BUILT IN

- Every paraphrased quote to be confirmed by the partner before publication, with changes free of charge.
- An annotated transcript so each quote could be traced to its source.
- An open invitation to correct how the company and its software were described.

## WHAT THE ENGAGEMENT DELIVERED

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- 01 A conversation turned into a story**  
A recorded call became a five-part story a finance reader can follow to the end.
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- 02 A balance both sides could sign off**  
The software's case is made through the partner's judgement, not at its expense.
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- 03 Quotes that could be checked**  
Every quote traceable to the transcript and ready for the partner's approval.
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- 04 A length set by the material**  
A tighter piece than first quoted, agreed in advance and kept within a 12-hour cap.
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*This project has been anonymised to respect client confidentiality and the terms of a non-disclosure agreement. All deliverable descriptions and process details are accurate representations of the work performed, and quoted lines are taken from the working documents. Company, firm and individual names have been removed.*