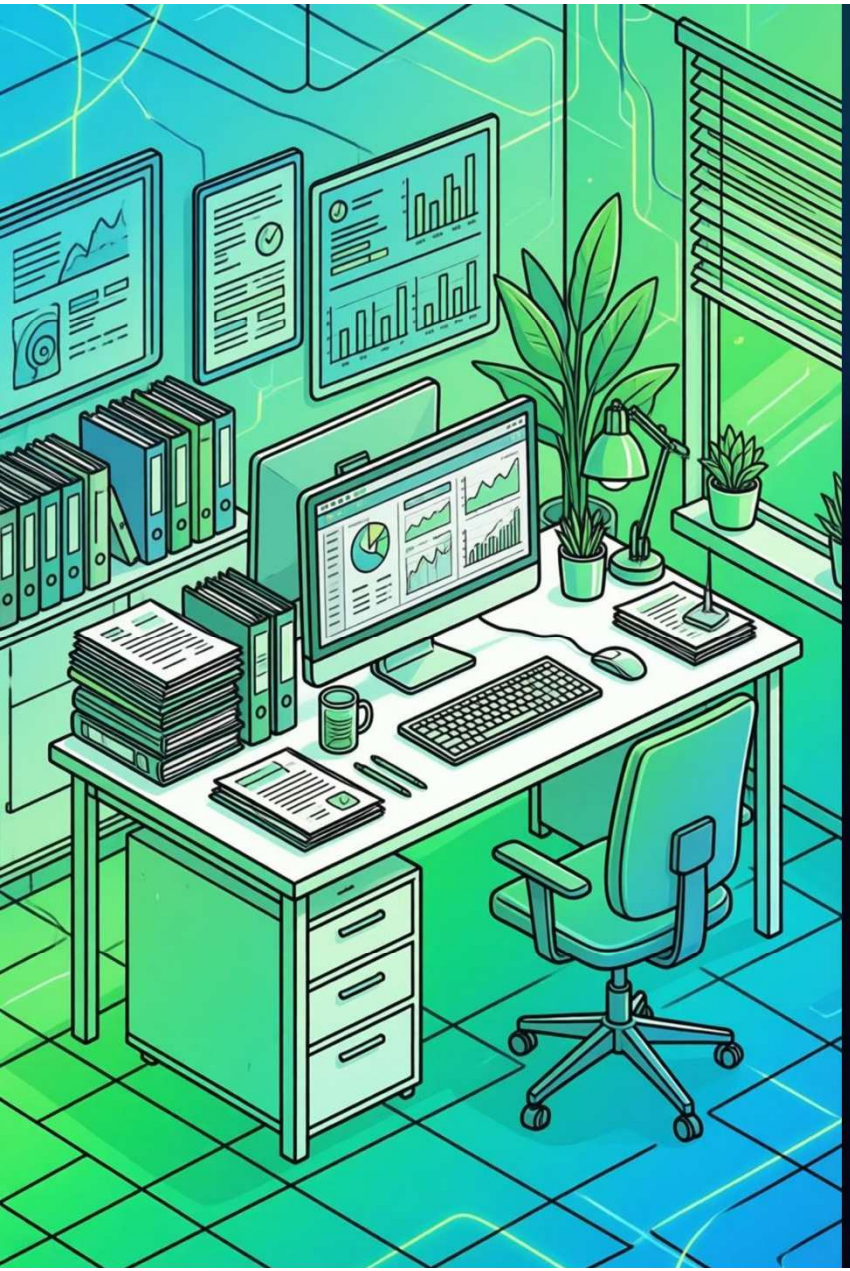


From Excel Checklist to Online Questionnaire

How artificial intelligence (Claude.ai) helped us modernise our income tax checklist – a practical report

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ALBO Euro Consult · Annual Meeting 2026

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Starting point: Our Excel checklist

≈ 75

checkpoints – from the last tax assessment to solar panels

11

topic blocks – insurance, children, rental income, investments …

6

tick-box columns – copy, original, confirmation, enclosure no. …

In everyday practice this meant …

- Client prints it, ticks boxes, scans it back in
- Documents arrive in batches – by post, e-mail, USB stick
- Incomplete records lead to follow-up questions
- Practically unusable on a smartphone
- Technical jargon puts clients off

The idea

“Can an AI turn our Excel list into an online questionnaire that we can put straight onto our website?”

Client-friendly

Plain-language questions instead of jargon – fill in on PC, tablet or smartphone.

Complete

Mandatory fields and a clear structure make sure nothing important is forgotten.

Digital

Information and documents reach the firm together, in a single step.

Three steps to the result

01



Upload the Excel file

Hand the checklist to Claude and describe in your own words what should be created.

02



Develop the concept

Claude analyses the list, groups it into logical sections and phrases the questions for clients.

03



Build it in HTML

Claude writes the finished code – we embed it in our website and refine it in conversation.

No programming skills needed: the entire exchange took place in plain, everyday language – in German.

Step 1: The request to Claude

Claude.ai



"Here is our checklist for the income tax return. Please turn it into an online questionnaire for our clients – written in plain language, with the option to upload documents."

Claude: "Happy to! I have analysed the checklist and suggest 8 sections – from personal details to document upload. Here is the draft …"

What Claude made of it

- Recognised the structure and organised it into logical sections
- Translated tax jargon into client-friendly language
- Chose suitable checkboxes, drop-downs and free-text fields
- Added current topics: crypto assets, solar power, wage-replacement benefits, energy-efficient renovation
- Asked questions where something was unclear

Step 2: From list to questionnaire

EXCEL CHECKLIST		ONLINE QUESTIONNAIRE
General details, bank account, spouse	→	1 Personal details
Children (child benefit, education, residence)	→	2 Children – add as many as needed
Employment, rental, capital, business, other	→	3 Income – simply tick the boxes
Commuting, work equipment, second household	→	4 Work-related expenses
Pension & insurance, special expenses, donations	→	5 Special expenses & insurance
Extraordinary costs, tradesmen, household	→	6 Extraordinary costs & household
Columns “copies / original / enclosure no.”	→	7 Upload documents
Other special matters – please explain	→	8 Changes & comments

Step 3: Implementation in HTML

Mandatory fields

Missing information is flagged before submitting.

Dynamic fields

“+ Add child” – as many children as needed.

Document upload

Drag & drop: PDF, JPG, PNG, HEIC, Word, Excel.

Mobile-ready

Photograph receipts directly with the phone camera.

Data protection

Consent checkbox with a link to the privacy policy.

Spam protection

An invisible check field keeps automated spam bots out.

The result: live on our website



Try it now

drweirich-istel.de/
einkommensteuer.html

Scan the QR code with your phone
(page in German)

Before – After

Excel checklist

- Print, tick, scan
- Technical terms and abbreviations
- Documents arrive separately and scattered
- Lots of follow-up questions and calls
- Hardly usable on a smartphone

Online questionnaire

- Fill in directly in the browser – 24/7
- Clear questions in plain language
- Information and documents arrive together
- Mandatory fields reduce follow-up questions
- Works on PC, tablet and smartphone

What is Claude?

Claude is an AI assistant made by the US company Anthropic – available in the browser at claude.ai, as a desktop app and on smartphones. You simply “talk” to it in everyday language.

Writing

E-mails, client newsletters, statements

Working with files

Read and create Excel, Word, PDF and PowerPoint

Programming

Forms, web pages, Excel macros

Analysis

Summarise documents, evaluate data, research

By the way: Claude also created this presentation – in the design of our firm’s previous talks.

More ideas for your firm

More questionnaires

Property tax, business succession, vehicle logbook, client onboarding

Correspondence

Newsletters, reminders, plain-language explanations of tax assessments

Excel analyses

Create or check formulas, pivot logic and reconciliation lists

Summaries

Tax circulars, court rulings and law changes in a nutshell

Internal training

Presentations and work instructions – e.g. bookkeeping routines

Checklists & processes

Document processes, update year-end closing checklists

Data protection & professional law – a must

Keep confidentiality

No client data in private or free accounts. Anonymise wherever possible. In Germany: § 203 StGB and § 62a StBerG.

Use a business account

On Team and Enterprise plans, Anthropic states that inputs are not used for AI training. Review the data processing agreement.

Check the results

AI can make mistakes. Professional responsibility always remains with the advisor – every result is reviewed.

Secure the questionnaire

Encrypted transfer (HTTPS), consent in the form and an updated privacy policy on the website.

In our project: Claude only saw the blank template – not a single piece of client information.

Tips for getting started

01 **Be specific**
State the goal, audience and desired result – as you would with a new colleague.

02 **Provide material**
Attach templates, examples or existing files directly.

03 **Go step by step**
Discuss the concept first, then ask for the implementation.

04 **Refine in dialogue**
“Shorter, please”, “different tone”, “add field X” – follow-ups are welcome.

05 **Test and verify**
Try the result yourself and check it professionally before it goes live.

Conclusion

“AI does not replace the tax advisor – but it takes routine work off our hands and frees up time for advice.”

- An Excel list became a modern online questionnaire
- No programming skills – just conversations
- Build in data protection from the start

Thank you! Questions & discussion

Success can be planned …

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