



# The State of AI in Accounting 2025

Emerging Trends, Challenges,  
& Opportunities

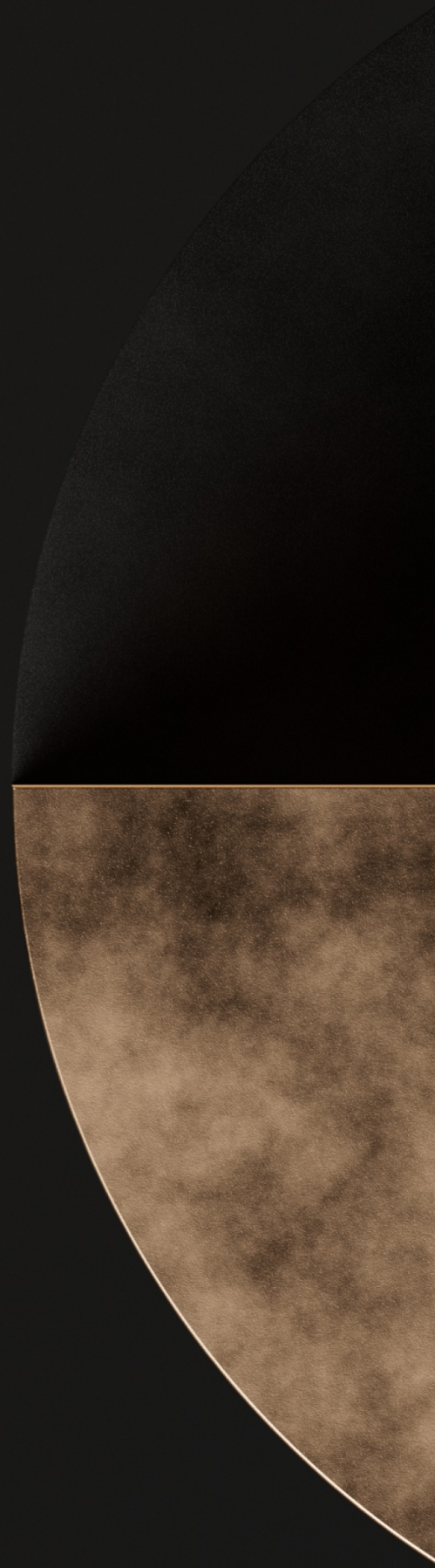
A KARBON REPORT

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## Demographics

The data in this report is based on a unique survey conducted by Karbon in November 2024. Respondents included 539 individuals from 6 continents, with the majority from the United States.

| Firm size    |     | Region         |     | Role   |     |
|--------------|-----|----------------|-----|--|-----|
| 1-3 staff    | 20% | Australia      | 17% | Individual Contributor<br>(Accountant, Enrolled Agent, Bookkeeper) | 23% |
| 4-10 staff   | 32% | Canada         | 16% | Operations/Technology/<br>Administration                           | 12% |
| 11-20 staff  | 18% | New Zealand    | 3%  | Manager  | 15% |
| 21-50 staff  | 13% | United Kingdom | 3%  | Partner/Director/Owner   | 48% |
| 51-200 staff | 12% | United States  | 47% | Other  | 2%  |
| 201+ staff   | 5%  | Other          | 13% |  |     |

## Survey Considerations

**Selection bias:** Respondents are within the broader view of Karbon, which may skew results as these firms are typically more progressive.

**Results:** The survey questions and calculation are not a perfect science, and could impact results. However, a pre-test was conducted to ensure the best opportunity to gain insights.

**Analysis:** All data provided was collected, calculated, and included in this report. The analysis is based on our best understanding and assumptions (including from expert opinion). Other reasons/rationale may also exist.



## Introduction by Chad Davis

If you told me five years ago that accountants would be excitedly sharing AI prompts and automation tips like grandparents sharing baby photos, I would've questioned your understanding of both accountants and excitement. Yet here we are.

The pace of change over the last year has been like drinking from a firehose, except the firehose is connected to an espresso machine. New LLMs dropping weekly, AI agents promising we don't have to work anymore, and enough geopolitical AI drama to fuel unlimited TikTok hot takes. It's exhausting just keeping up with the headlines.

Truthfully—we don't need to be AI experts. My most successful friends aren't the ones testing every new model release. They're the ones who figured out their priorities first, then found the right tools to match. Revolutionary, eh?

Want to know the most effective thing I did last year? It was picking up the phone and talking to 100% of our customers. That led to more revenue, better relationships, and ideas on where we can improve.

Some firms are automating mundane tasks at lightning speed. Others are moving with the cautious precision of a sloth doing tai chi. Both approaches work—although one would be more fun to watch.

If 2024 was the year of “no way, that's possible?”, it looks like 2025 is shaping up to be the year of “look what we just did!”

So, welcome to accounting in 2025. Where the most innovative firms aren't just asking AI to solve their problems—they're solving the right problems to begin with.

*Chad Davis*

**Chad Davis**  
Co-Founder & Partner  
LiveCA LLP

# Key Findings

### **Confidence in AI is growing.**

AI capabilities are becoming better quickly—and there’s no slowing down. As a result, accounting professionals are looking forward to how AI will continue to transform the industry.

### **‘AI Anxiety’ is declining, but not for everyone.**

Individual contributors are still more hesitant about AI than firm leaders, but they are less concerned about job security since last year. The same can’t be said for people in operations, technology, and administration roles.

### **Almost everyone is excited about AI, but they don’t believe others are.**

Accounting professionals are more optimistic about AI than last year, but they don’t believe their colleagues are. This suggests the need for ongoing communication and training about AI within firms.

### **Data security is still a concern.**

The majority of accounting professionals believe that AI has a negative effect on their firm’s data security, especially those in operations, technology, and administration roles.

### **Communication reigns, but new use cases are gaining momentum.**

Communication is still the #1 AI use case for accounting professionals, but new use cases—such as in-depth research and financial forecasting and analysis—are emerging, making it an increasingly versatile tool.

### **Bookkeeping could be the most affected by AI.**

While the majority of accounting professionals aren’t worried about AI replacing them, they are still concerned about impacts to the bookkeeper’s role.

### **Now or never: AI training sets firms apart.**

Firms save more time per employee each year when they invest in AI training. Firms that do not invest in AI or AI training are falling behind.

### **Leaders are championing AI.**

Firm leaders feel the most excitement towards AI, and are uniquely positioned to inspire and encourage their teams with open dialogue and AI advocacy.

THE PULSE

# AI's Effect on Accounting Today

AI has entered the scene, with most accounting professionals embracing it.

AI capabilities are reaching new heights with no sign of stopping—it's expected to save the financial services industry \$1 trillion by 2030. In 2024 alone, OpenAI released six new ChatGPT models to satisfy the growing demand for newer and better developments—with 65% of companies planning to invest in generative AI in the next five years globally.

For the accounting industry, the uptake of AI is mostly unavoidable, with 80% of accounting professionals reporting increased AI functionality in their existing software. Change is already here—and the reception is mostly positive. 85% are excited, or at least intrigued, by the prospect of AI.

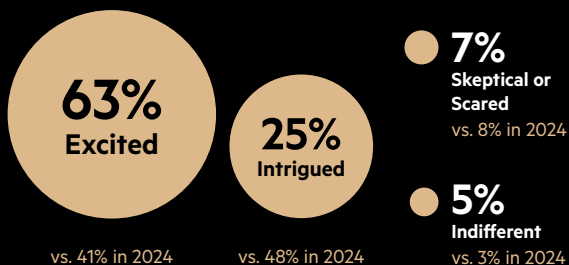
Despite this, only 19% believe that their peers share their excitement. This suggests that the industry is thinking about AI, but it isn't talking enough about it.

Firm leaders have the greatest influence on these conversations. Owners, partners and directors continue to be the most optimistic about AI, seeing it as an ally and an opportunity for growth. On the other hand, individual contributors (accountants, bookkeepers, enrolled agents) and those in operations, technology, and administration roles are more likely to be skeptical or scared—although that number has declined since last year (-7% YoY).

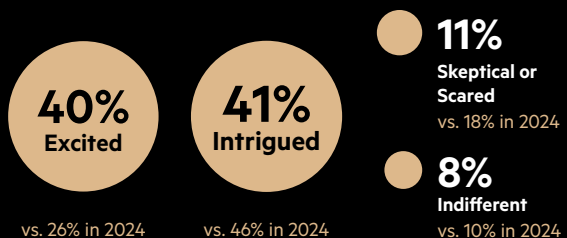
So, while some hesitation is natural—and necessary for a fully rounded discussion—attitudes towards AI in the accounting industry are increasingly more positive. Firm leaders especially are lighting the way forward.

## How are accounting professionals feeling about AI?

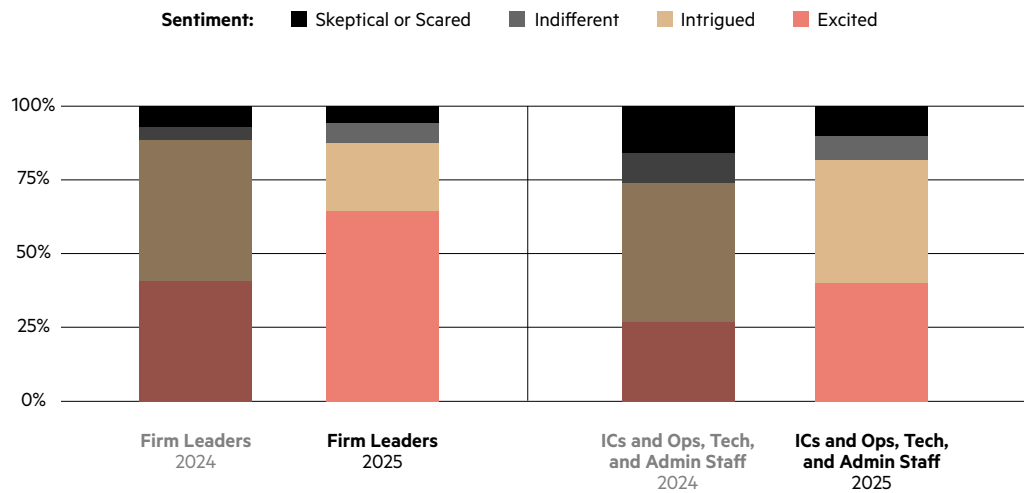
### Firm Owners, Leaders, Partners



### Individual Contributors and Operations, Technology, Administration Staff



## How do accounting professionals feel about AI compared to last year?



“

To me, AI is a powerful tool that can augment human potential, offering new ways to understand the world, solve complex problems, and improve lives.”

Manager  
4-10 staff accounting firm, Asia

“

I am tentatively excited for the future of AI with a lot of reservations.”

Individual Contributor  
51-100 staff accounting firm, United States

“

**AI, in the short term, is a nice additional tool in our toolbox as accountants. I believe over the next 1-3 years, AI will be built into every tool we use. In the mid- to long-term, it's anyone's guess whether AI causes more issues than it solves.”**

**Partner/Director/Owner**

11-20 staff accounting firm, United States

Firm size is one of the main factors influencing AI sentiment. The most excitement, based on YoY increases, is coming from firms on either end of the spectrum and then somewhere in the middle: small firms (1-3 staff), whose employees are 26% more excited, mid-sized firms (21-50 staff), whose employees are 29% more excited, and large firms (201+ staff), whose employees are 33% more excited.

Other sentiments towards AI—intrigue, skepticism, and fear—are on the decline, accounted for by a greater awareness, exposure, and integration or adoption of AI. Small firms are becoming less pessimistic compared to their larger counterparts, with the greatest declines in skepticism and fear in firms with 1-3 employees (-7% YoY) and 11-20 employees (-5% YoY). On the other hand, large firms with 51-200 employees saw a unique 6% increase in skepticism and fear. Scaling, implementation, and training are natural roadblocks to the growth of any company that size, but glass ceilings are made to be broken.

Overall, the firms most excited by AI based on size are the medium tier make-or-breakers with 21-50 employees (66%), who are at a pivotal stage of their growth. AI-enabled solutions could be the leg up they need to reach new heights and overshadow their competitors.

Firms of this size are also more likely to have the highest Practice Excellence scores, outperforming their peers in the Practice Excellence pillars of growth, strategy, management, and efficiency.

## Practice Excellence for Accounting Firms

A free assessment that identifies your accounting firm's strengths, opportunities, and relative positions to your peers.

[Get your Scorecard](#)



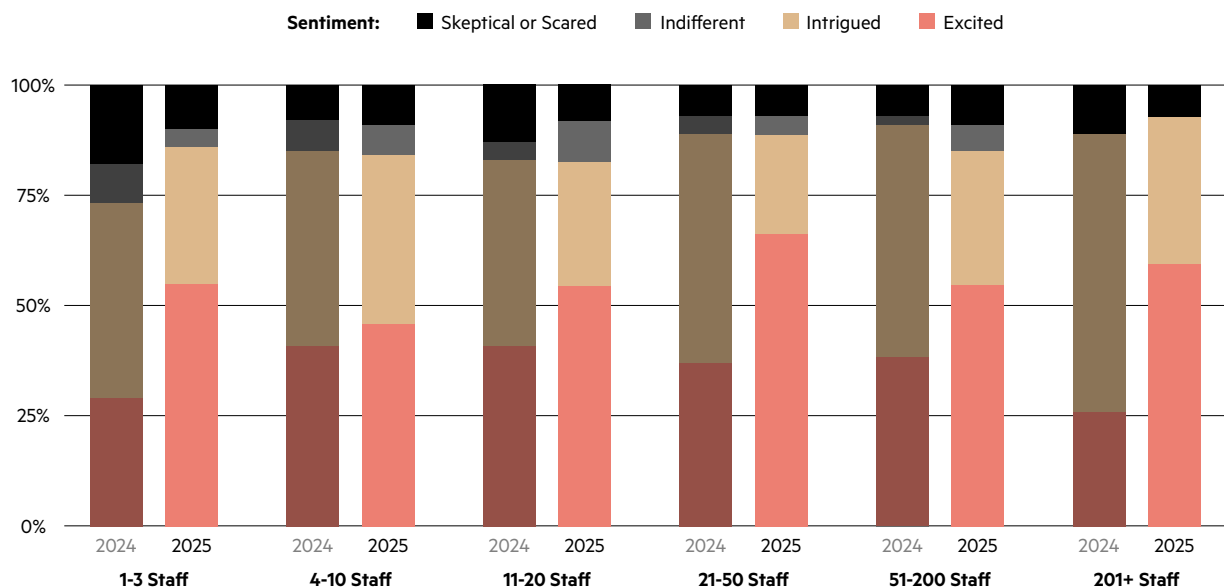


“

**AI is a powerful tool for automating tasks, enhancing efficiency, and providing data-driven insights and research, allowing me to focus on high-value client advisory and strategic growth at our firm.”**

**Partner/Director/Owner**  
2-3 staff accounting firm, Canada

## How does a firm’s size influence its approach to AI?



“

**AI is like having an expert on hand to immediately do a variety of tasks at a moment’s notice...The number of things my AI expert can do keeps growing and is critical to my accounting practice as I seek to grow.”**

**Partner/Director/Owner**  
Solo accountant, New Zealand

## AI IN PRACTICE

# How Accounting Firms are Currently Using AI

Since last year, more accounting firms have adopted AI—and it's becoming more than a simple support tool.

While most firms are prioritizing AI as a way to curb the burden of operational tasks, there is a gradual shift towards more technical, nuanced functions. Marketing content and financial analysis are emerging use cases, with client support (10%) and tax prep and audits (8%) on the table, though in the minority. This trend could lead to AI becoming a versatile tool that complements the human expertise of the accounting profession.

The largest shift in the last 12 months is the amount of people using AI meeting assistants like Fellow, Otter, and Fireflies. 12% more accounting professionals are using these tools to record calls, transcribe audio, and extract information to summarize, list key insights, and generate action items.

Currently, accounting professionals are leveraging AI in three key areas:

- 1** COMMUNICATION  
**63%** +4% (YoY)  
are using AI to compose emails and fine-tune their writing tone.
- 2** TASK AUTOMATION  
**41%** +4% (YoY)  
are using AI to automate their workflows, freeing up valuable time and redirecting their focus towards more complex, value-adding activities.
- 3** MEETING TRANSCRIPTS  
**40%** +12% (YoY)  
are using AI to transcribe meetings, and automatically generate action items and meeting summaries for clients and colleagues.

These are some notable and emerging AI use case in accounting:

- RESEARCH**  
**39%**  
are using AI to support a broad range of research activities.
- MARKETING CONTENT**  
**26%**  
are using AI to generate marketing content, enabling them to expand on their go-to-market function.
- FINANCIAL FORECASTING & ANALYSIS**  
**13%**  
are using AI to analyze financial information to deliver almost instant insights.

“

**We have to adapt and learn to leverage AI or we will be out of business. AI presents an opportunity to improve efficiency and quality of service, and opens doors to other types of service.”**

**Partner/Director/Owner**

21-50 staff accounting firm, United States

“

**AI is the tool we will use to complete the mundane, boring, repetitive ‘monkey’ tasks, which will in turn allow us to focus on more complex and fulfilling tasks. Human relationships might even be positively impacted by this as there will be more time for human interaction.”**

**Manager**

11-20 staff accounting firm, United Kingdom

## AI IN ACCOUNTING

# Understanding the Bigger Picture

AI for accounting is no longer a novelty—it's a necessity.

83% of accounting firms are making the most of AI, offloading routine, low-level tasks onto automation, generative apps, and virtual assistants, so they can prioritize their clients, staff, and business strategy.

With more capacity to focus on work that drives growth and profitability, AI-positive firms are positioned to out-strategize and out-scale their traditional counterparts, giving them the edge in an increasingly competitive market. Some have even started to introduce new services (13%) and more are considering following suit (37%)—making it harder for AI-resistant firms to catch up in the long run.

**27%** (-1% YoY)

**of respondents are concerned that the gap between AI-positive and traditional firms will continue to widen.**

### Accounting professionals continue to see the benefits of AI:

AI isn't science fiction anymore. It's a business reality—and with most software vendors applying AI within their product, it will become part of an accounting firm's tech stack sooner or later. Staying competitive means staying agile.

On average, accounting professionals save 56 minutes a day (a potential of 18 hours a month) with AI, with over a third (38%) of this time spent on communication tasks like drafting emails and managing correspondence. Role, geography, firm size, and services offered did not have a significant bearing on the amount of time an employee can save. But skill level did, with advanced users saving 71% more daily minutes than beginners.

**56%** (+2% YoY)

**believe that the value of a firm drops if it doesn't use AI.**

When firms invest in AI-focused education and training, they save a daily average of 66 minutes per employee—22% more than those that don't. That's a difference of 40 hours annually. Despite this, 57% of firms offer no AI training, while only 37% actively offer or are developing educational resources related to AI.

Firms at ground zero—with no AI or AI training—are losing almost 7 weeks a year to their AI-progressive competitors.

**46 minutes  
saved per day**

by respondents who use AI  
at a beginner level

**79 minutes  
saved per day**

by respondents who use AI  
at an advanced level

“

**AI is similar to a very complex Excel formula; it can accomplish great things if set up well. But if the input data is bad, the results will be bad.”**

**Manager**

51-100 staff accounting firm, United States

71%

more time is saved by advanced users of AI than beginners.

By saving time, firm leaders are creating space for more meaningful work. In the future, accounting professionals may choose to, or be asked to, develop new advisory or technical skills to satisfy evolving client expectations, which means their capacity (and work-life balance) is just as important as their capability. And with small (26%), medium (54%), and large (56%) firms worried about recruiting and retaining employees, firm leaders can't afford not to prioritize employee satisfaction.

79%

believe that graduates are more likely to join accounting firms that actively use AI and other advanced technologies.

As the accounting talent shortage continues to persist, with more accountants retiring than entering the profession, firm leaders continue to shoulder the pressures of attracting and retaining top accounting talent. AI and other emerging technologies can take some of this weight.

Young people want to work in progressive, tech-forward industries. Accounting can be that industry—it's ripe with possibilities. Firm leaders should feel empowered by these opportunities, and learn from thought leaders in the accounting space who are experimenting with AI and sharing their findings.

“

**AI, to me, is more than just automation—it's a partner in reshaping how I work and connect with clients...AI enables me to streamline complex processes, saving time and boosting efficiency. But beyond the technical gains, it allows me to focus on what truly matters: building relationships, sharing knowledge, and helping clients see the future possibilities for their businesses.”**

**Chad Davis**  
Co-Founder & Partner, LiveCA LLP

**57%** (-2% YoY)

believe that bookkeeping will be the most disrupted function by AI.

**But some accounting professionals have valid concerns:**

Partners, directors, and owners are more likely to be excited than individual contributors about AI. They are also 2.5 times more likely to be excited about the prospect of using AI to forgo hiring staff in the next 1-2 years—and that’s a real concern to the accountants, bookkeepers, and enrolled agents who could be affected.

“

**I believe AI is more about augmented intelligence than artificial intelligence because it enhances human decision-making by providing data-driven insights and automation, rather than replacing human creativity and judgment.”**

**Partner/Manager/Owner**  
4-10 staff accounting firm, Australia

“

**There are a lot of mundane tasks in accounting and tax prep that AI can easily do for much less cost than hiring a person who will be bored doing it.”**

**Partner/Manager/Owner**  
4-10 staff accounting firm, United States

“

**AI is a great tool, but doesn’t completely replace a human.”**

**Manager**  
11-20 staff accounting firm, New Zealand

As AI technology continues to mature and find its footing within accounting firms, concerns about job security reveal a nuanced and evolving narrative. Among individual contributors, the percentage of those worried about their job security due to AI has slightly declined from 30% last year to 28% this year. This marginal decrease may reflect growing familiarity with AI tools and their potential as enablers of efficiency rather than threats to employment.

But this doesn’t signify a universal decline in AI-related anxiety. For operations, technology, and administration staff, concerns about their future in the profession have increased, rising from 18% last year to 20% this year. This group’s heightened worry could stem from the increasing automation of their tasks, such as scheduling, document management, and workflow coordination—areas where AI has made significant inroads.

Data security and privacy are also a cause for pause, with 70% concerned (-6% YoY) about the impact of AI on data security, and 23% reporting that AI negatively affects their firm's data security. Everyone is slightly less concerned with data security than they were 12 months ago, except for those in operations, technology and administration roles. They are 9% more concerned about AI's impact on security—another reason for this cohort's increasing pessimism.

Safety measures, like a cybersecurity policy, AI policy, employee training, and secure practice management tool can help address these concerns. This is critical, given that accountants are prime targets for hackers as a result of how much confidential client data they have access to.

**70%** (-6% YoY)

are concerned about data security when evaluating AI tools.

Fewer accounting professionals (-8% YoY) are worried about AI's impact on the human element of client relationships. Perhaps those initial fears have settled now that people are exploring and implementing how AI can augment relationships, rather than diminish them.

“  
**If confidentiality and data security was ensured, then our firm would be using AI.”**

Operations/Technology/Administration  
4-10 staff accounting firm, Australia

“  
**An AI policy is not there to create a cage, it is there to create a safe playground where your team can experiment and develop their skills.”**

Inbal Rodnay  
AI expert

**47%** (-8% YoY)

are concerned that AI may result in a decrease in human touch and relationships.

46% of accounting professionals (-3% YoY) are concerned about ethical dilemmas and biases in relation to using AI. It's important to remember that while AI continues to evolve and be incredibly helpful, it is still flawed. Just like humans.



# The AI Paradox in Accounting

The 2024 edition of this report posed an important question: **Will the accounting firms that seize the opportunity and commit to AI training give themselves a significant advantage?**

**The early answer to that question is yes.**

85% of respondents say they're intrigued or excited by AI (+3% YoY), with 37% actively investing in AI training for their teams. While this discrepancy is still large, there are 12% more firms providing or developing AI training for their staff members compared to last year.

It's important that firms continue to invest in this area—formalized staff training is one of the biggest drivers of Practice Excellence among accounting firms across the globe.

**85%**

**of respondents say they're intrigued or excited by AI, yet only 37% are actively investing in AI training for their teams.**

“

**If all you do with AI is to create multiple streams of communication and reminders not only for your clients but for your staff, I promise you, that's a huge win with very little effort.”**

**Ashley Francis**  
Owner, The Francis Group, PLLC

# The Impact of AI on the Industry

AI is disrupting the accounting industry in some areas more than others.

The three functions forecast to be most affected by AI are bookkeeping (57%), accounting (29%), and tax (27%), while wealth management was voted the least likely to be affected (4%). However, wealth management is undergoing major transformation—time will tell.

These predictions may feel daunting, but disruption is inevitable with any new technology. The industry as a whole is shifting, with 72% of respondents agreeing that AI will transform the role of accountants from compliance to advisory.

Managing this uncertainty relies on the ability to effectively build trust. Overall, 49% of accounting professionals trust AI in some capacity. This is a 20% increase from last year. Unsurprisingly, firm leaders are the most trusting of AI (55%), while individual contributors are the least trusting (38%). It's important to reiterate that trust in AI is gaining momentum across all roles in accounting.

## So, how do you continue that momentum?

The truth is, there's still much to learn about AI. Accounting professionals who feel their roles are most likely to be threatened need reassurance. Firm leaders can inspire confidence by starting open conversations, investing in AI training to increase exposure, and emphasizing the benefits of AI, including growth potential.

In fact, the more training you offer your employees, the more likely they are to be excited about the impact of AI on their role and the industry.

“  
**AI means more time on advisory and less on compliance work.”**

**Partner/Director/Owner**

2-3 staff accounting firm, United States

People with AI training available to them (or in development) are more excited by AI than those with no training. That's no coincidence. In fact, excitement is higher (44%) among firms actively working on training. On the other hand, 70% of people at firms without training feel skeptical or scared about AI, likely due to a lack of understanding or perceived risks. Firms actively engaging with AI training show much lower levels of skepticism (19%). This indicates that exposure to AI tools and their benefits positively correlates with enthusiasm.

“  
**AI provides our team with efficiencies that would've never been possible, across all sectors. Our bookkeeping team now turns hour-long processes into 45 seconds and the tax team will be streamlining their data gathering and auto-fills soon.”**

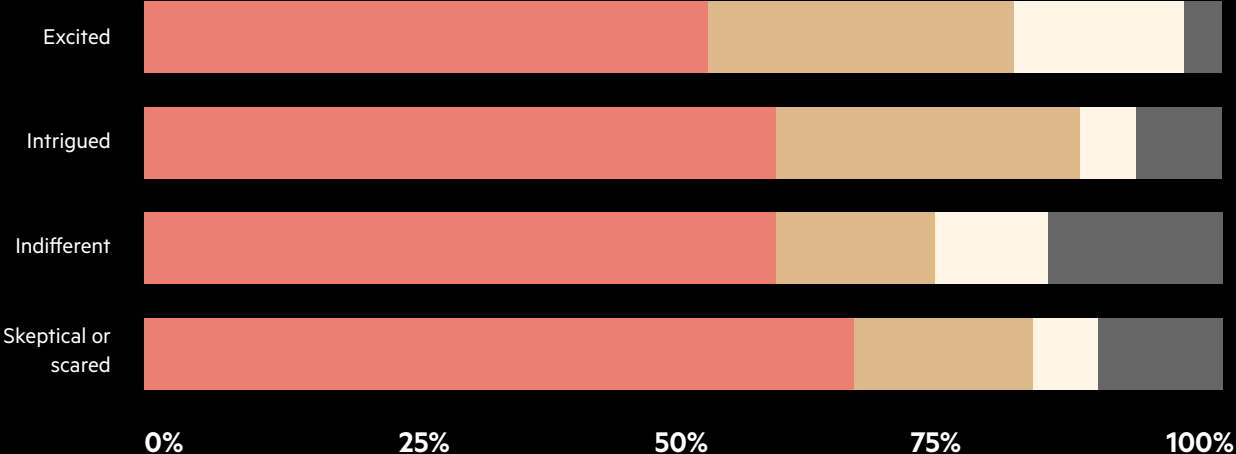
**Operations/Technology/**

**Administration Team Member**

21-50 staff accounting firm, Australia

# The impact of training and education on the perception of AI among accounting professionals

How do you feel about AI?



Does your firm offer AI training and education?

- No AI training
- In development
- AI training available
- Not sure

“  
**I don’t see AI as a disruption, I see it as an opportunity. It can only be a disruption if it catches us unawares and we’re unable to pivot. It is my role to ensure it does not.”**

**Partner/Director/Owner**  
 4-10 staff accounting firm, Australia

“  
**AI can be very helpful in some areas, however it’s very concerning and scary to adapt to.”**

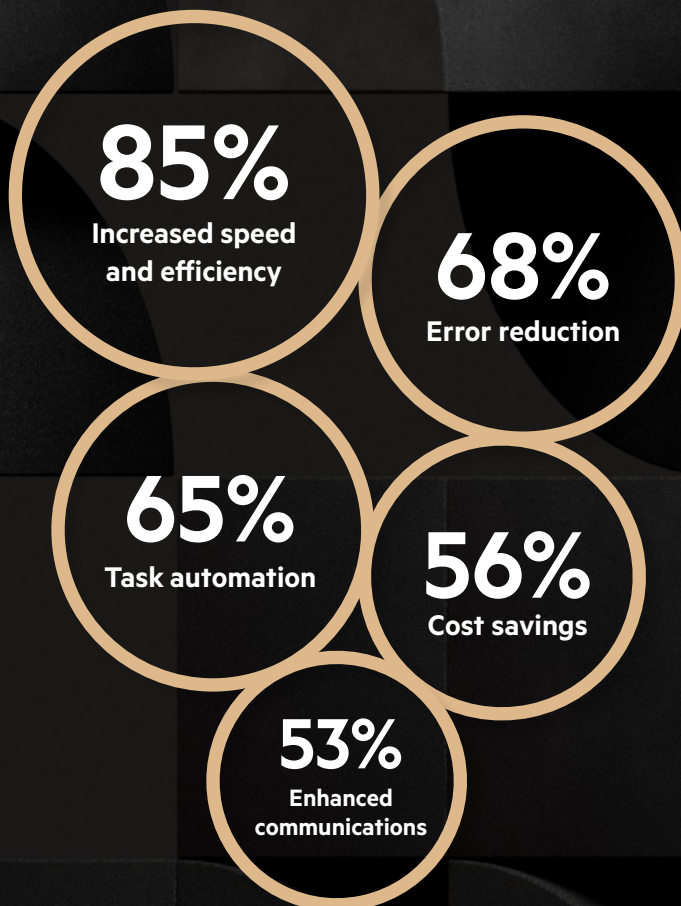
**Operations/Technology/Administration Team Member**  
 101-200 staff accounting firm, United States

# Navigating the Future of AI in Accounting

Firms are getting on board or getting left behind.

The presence of AI in everyday business cannot be denied. It's here—it's moved in, bought furniture, and had three kids; it's not going anywhere. Accounting professionals are excited to see AI transform their firms for the better in the short term across efficiency, accuracy, automation, communication, and cost savings.

## Which AI benefits are accounting professionals most excited about?



Technology evolves with its users—you can start to make these changes a reality by taking action today:

**1. Embrace (safe) play:** Experiment with AI tools like [ChatGPT](#), [Claude](#), and [Gemini](#). Get to know how they work and how best to prompt them, even if you begin with non work-related tasks. If any of your current tools offer AI features, why not take advantage of them? See how they interact with your firm's processes and how much time and effort they save you. There are also plenty of [low and no-code tools and resources](#) to experiment with to help streamline your firm's operations.

It's important to engage safely and [practice cybersecurity](#). Developing an AI policy at your firm will help ensure your staff are using it responsibly.

**2. Encourage learning:** General AI content is useful, but accounting-specific resources will help you understand how AI can help you in the context of your actual firm. Karbon Magazine's growing [AI resource library](#) is a great place to start.

**3. Listen to the experts:** Follow industry leaders like [Brian Clare](#), [Jason Staats](#), [Chad Davis](#), [Ashley Francis](#), [Inbal Rodnay](#), and [Kendra Vant](#) who are constantly sharing ways to leverage AI.

By becoming more familiar with AI, accounting professionals can feel more confident and capable in their roles. Firm leaders who encourage this also empower their team to contribute new ideas for AI-enabled services or solutions, maximizing the value they can bring to clients. It's a win-win-win.

### **Get started with AI-powered practice management**

AI exploration and discovery should happen in places that make it easy to use, experiment with, and test. Where you begin to reap real benefits is leveraging it through the tools you're already using—these are the key places you should be looking at.

Your practice management tool is the heart of your accounting firm. It's the operational core that houses critical information about your firm, clients, and team—from communications to workflows, to collaboration and planning. An AI-powered practice management tool leverages this data, helping you streamline workflows, simplify communication, surface insights, and optimize client engagement. Tools like Karbon AI combine the revolutionary power of AI with the context of your accounting firm.

“

**Just like when cloud accounting software started hitting the market, we all had to try it out to see if it benefitted us and our clients. It's the same with these AI apps. Yes, there are a lot of them, but pick one or two and test them. Test, test, test. See what your peers are doing. It'll get easier the more you use them and ideas will start flowing.”**

**Brian Clare**  
CEO, Blueprint Accounting

## The time to embrace AI was yesterday

The gap between AI-positive and traditional firms is growing. 27% of small accounting firms (2-3 employees) reported that they are not currently using AI. Those already leveraging AI solutions have a headstart, powering ahead of their competitors, and as the momentum behind the technology accelerates, it will become exceedingly difficult for resisters to catch up.

Firm leaders are most concerned about their ability to keep up with the competition, as the 'AI Arms Race' evolves. This is a crucial time for the accounting industry—firms must address critical gaps in training, security, and perception now, so they can stay in the race.

One thing is clear: the majority of accounting professionals have embraced AI, and those who champion it can be the driving force behind their firm's success—and the future of the industry.

“

**Don't believe the hype.  
And don't sit on the sidelines.  
My best advice is to get in  
and get your hands dirty today  
so you will be able to sort  
the hype from the  
substance tomorrow.”**

**Kendra Vant**  
Director, Europa Labs

“

**For our firm, AI means  
enhanced efficiency, improved  
accuracy in financial analysis,  
and more insightful client  
advisory services.”**

**Operations/Technology/Administration Team Member**  
11-20 staff accounting firm, Australia

“

**AI is the opportunity to do more, better.”**

**Partner/Director/Owner**  
201+ staff accounting firm, United Kingdom



# AI-Powered Practice Management

Automate tasks, work smarter, and strengthen client relationships with Karbon—the #1 ranked collaborative practice management platform built for growth.

**karbonhq.com**

**Summary**

- Sara emailed Christina from Anapurna Inc to request account statements
- Christina asked a question and Sara responded
- Christina provided the account statements



The screenshot shows the Karbon software interface. On the left is a navigation sidebar with categories like Triage, My Week, Assignments, Work, Contacts, Intelligence, Insights, Time, and Billing. The main area is titled 'Triage' and shows 'All - 123' items. A message from Pax Zwanikken to Tara Sampson is highlighted, with the text 'I need you to call me about this.' Below the message is a 'Karbon AI Summary' box containing a bulleted list of details: Pax emailed Tara about an immediate tax payment due today, Tara requested clarification on the amount, Pax scheduled a meeting to review and clarify the tax amount, Pax requested the revised payment from Tara, and Tara confirmed the payment would be made by the end of the day. At the bottom of the message area are buttons for 'Reply To All' and 'Comment'. On the right side of the interface, there is a 'NOTIFY ME' section with 'New Comment' and 'ASSIGNMENT' sections with 'Assigned to', 'Due Date', and 'Status' fields. A 'TIMELINE' section shows 'Lakeside' and a 'VISIBILITY' section shows '35 colleagues conversation'.