



# Business Learning Institute

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## Session 3:

# Unleash Productivity: Mastering Gen AI/ChatGPT for Accounting Professionals #TwinzTalk

**Don Tomoff**

Business Learning Institute Provider

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### PRESENTED TO

North Carolina Association of CPAs

In-person (Asheville, NC)

September 9, 2024



## Donald Tomoff, CPA, MBA

Don is the founder of Invenio Advisors LLC, a consulting firm specializing in information management, process improvement, reporting and data analysis, as well as education and training. Don's experience includes "Big 4" public accounting, senior-level industry finance positions, and consulting. Don's industry experience includes serving eight years with Jo-Ann Stores as VP, Finance and Treasurer.

Since 2010, Don has focused his efforts with executives and companies on many digital process improvement, data analytics and training initiatives, including developing and implementing mobile information strategies. His efforts are focused on the identification of process improvement opportunities, and leveraging readily available technology tools to drive that change. In addition to consulting, Don speaks at various conferences, including the IMA National Conference in Indianapolis, IN.



## ADDITIONAL MATERIALS FOR YOUR STAFF

Pam Devine, Customized Learning Manager

800-782-2036, ext. 321 | [pam@aicpa-cima.org](mailto:pam@aicpa-cima.org)

Automation In Excel: Using Macros Without Understanding Code (VBA)

CPA Firm Business Development: Don't Miss The Data Analytics Opportunity

Custom Excel Training: Basic to Beginner Advanced

Excel – Young Professionals: Skills to Jump Start Your Career

Excel Data Management: Tables and Pivot Tables Challenge

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 1 – Excel Basics and Best Practices

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 2 – Formulas and Functions: Best Practices and Top Functions To Understand

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 3 – Data Management & Introduction to Power Query

Excel Essentials & Intro to Data Analysis For Accounting and Finance: Part 4 – Data Analysis, Pivot Tables and Power Pivot

Excel Productivity: 5 Excel Tips and Techniques to Massively Boost Team Productivity

Excel, Power BI and Data Analysis – Eliminating the Paralysis of the Analysis

Excel, Power BI and Data Analysis – Eliminating the Paralysis of the Analysis

Excel, Power Tools, and PowerBI: Upping Your Data Analytics Game

Excel: 5 Reports Your CFO Wants (But Probably Doesn't Have) – Developing an Anticipatory Mindset

Excel: 5 Tips for Understanding a Complicated Spreadsheet

Introduction to Data Analytics with Power Pivot

Introduction to Microsoft OneNote

Introduction to Data Analytics with Power Query (Get and Transform in Excel 2016)

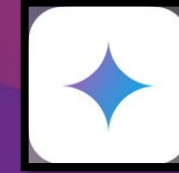
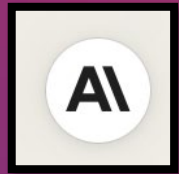
Stand Out with Your Excel Skills: Key Capabilities to Set You Apart

Tech Trends for Accountants: What To Know and What You Can Do About It

The Big 5: Excel and PowerBI Data Topics

The Essentials of Data Analytics: Excel & PowerBI

Welcome To The Future: Forget "Excel" – Understand Today's Excel



# Unleash Productivity:

## *Mastering GenAI/ChatGPT for Accounting Pros*

Presentation For NCACPA's  
Donald Tomoff, MBA, CPA  
Bill Tomoff, MBA, CPA, CMA  
September 9, 2024

# About The Twinz (#Twinztalk)



*"Helping one person might not change the whole world, but it could change the world for that one person."  
-Anonymous*

# Results of this Poll at AICPA-ENGAGE Conf – June 5, 2024

How much time do you spend using AI tools like ChatGPT in a typical week?

1. Haven't tried it yet
2. Less than 20 minutes
3. 20 minutes to two hours
4. More than two hours



**68%** answered “Haven’t Tried it Yet” or “Less than 20 minutes” per week.

# Agenda

Introduction

Foundational Mindset

Learning Together & Prompting

Advanced Tips & Techniques

Wrap Up

*“When you’re  
finished  
changing,  
you’re  
finished.”*

*– Benjamin  
Franklin*

# Learning Objectives

1. Recognize and distinguish the key components of a foundational mindset for effectively utilizing generative AI and ChatGPT.
2. Recall and use prompts for AI tools, including the creation and use of a prompt library to enhance productivity in daily tasks.
3. Apply Custom GPTs, to address specific professional use cases while maintaining ethical standards and data confidentiality.
4. Apply a strategic approach for integrating AI tools into daily workflows, including the creation of a use case tracker to identify opportunities for process improvement.

*“The more that  
you read, the  
more things  
you will know.  
The more that  
you learn, the  
more places  
you’ll go.”*

*- Dr. Seuss*





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# Introduction

## TIP #1

*Mindset shift is  
IMPERATIVE!*



# WIRED TO RESIST

The Brain Science of Why Change Fails  
and a New Model for Driving Success



**UPDATED**  
With a new  
prologue and  
epilogue on managing  
change in the global  
pandemic.

**Britt Andreatta, PhD**

READ BY THE AUTHOR

Author of *Wired to Grow*, *Wired to Connect*, *Leading with Emotional Intelligence*,  
*Leading Change*, *The Neuroscience of Learning*, and *Having Difficult Conversations*

## ChatGPT Prompt...

*“Please tell me about the book at this link -  
[https://www.amazon.com/Wired-Resist-  
Science-Driving-Success/dp/B089XWV1GL](https://www.amazon.com/Wired-Resist-Science-Driving-Success/dp/B089XWV1GL)”*

[ChatGPT Thread](#)

[Amazon Link](#)

**ChatGPT**



**ClaudeAI**



**GEN AI – “BIG 4”**

**Co-Pilot**



**Gemini**



# Using AI with Microsoft Office – Co-Pilot!

*“Copilot uses next-generation AI to automate and simplify tasks.”*

## Step into the future of work



Report

### 2024 Work Trend Index: Learn how AI is reshaping work

75% of knowledge workers around the world use generative AI at work. Are business leaders ready?

[Read the report](#)



Report

### First look: Insights from early Copilot users

[Read the report](#)



Report

### The New Performance Equation in the Age of AI

[Read the report](#)



Article

### How business leaders are using Copilot

[Read the article](#)

*“By grounding in your business content and context, Copilot delivers results that are relevant and actionable.”*

**Jared Spataro,**  
*Microsoft corporate vice president for modern work and business applications,*

<https://www.microsoft.com/en-us/microsoft-copilot/meet-copilot>



# ChatGPT – web based interface from openai.com

The screenshot shows the ChatGPT web interface. On the left is a sidebar with a list of custom GPTs: ChatGPT, Data Analyst, ESGuardian, DALL-E, Creative Writing Coach, and 35 more. Below this is a list of chat threads categorized by 'Today' and 'Yesterday'. The main area displays the OpenAI logo and the prompt 'How can I help you today?'. Below the prompt are four suggested prompts: 'Make a content strategy', 'Help me pick', 'Brainstorm names', and 'Plan an itinerary'. At the bottom is a message input box with a yellow highlight on the text 'Message ChatGPT...' and a yellow highlight on the send button. A blue arrow points from the 'MESSAGE BOX PROMPTING' label to the input box. Other blue labels with arrows point to the sidebar ('CUSTOM GPTs'), the chat threads list ('CHAT THREADS'), and the account information at the bottom right ('ACCOUNT INFO').

**CUSTOM GPTs**

**CHAT THREADS**

**ACCOUNT INFO**

**MESSAGE BOX PROMPTING**

ChatGPT 4

ChatGPT

Data Analyst

ESGuardian

DALL-E

Creative Writing Coach

35 more

Explore GPTs

Today

Excel Help: Unclear Prompt

Munger Wisdom GPT Integration

GPT: Transforming Workflows

Improve Prompt: Chat Title

Excel Formula Expert GPT

Yesterday

Sales Analysis in Excel

IMAGE Index Match Calcplease

Excel Formula Documentation

Add Team workspace  
Collaborate on a Team plan

Donald Tomoff  
Personal account

How can I help you today?

Make a content strategy  
for a newsletter featuring free local weekend events

Help me pick  
an outfit that will look good on camera

Brainstorm names  
for an orange cat we're adopting from the shelter

Plan an itinerary  
for a fashion-focused exploration of Paris

Message ChatGPT...

ChatGPT can make mistakes. Consider checking important information.



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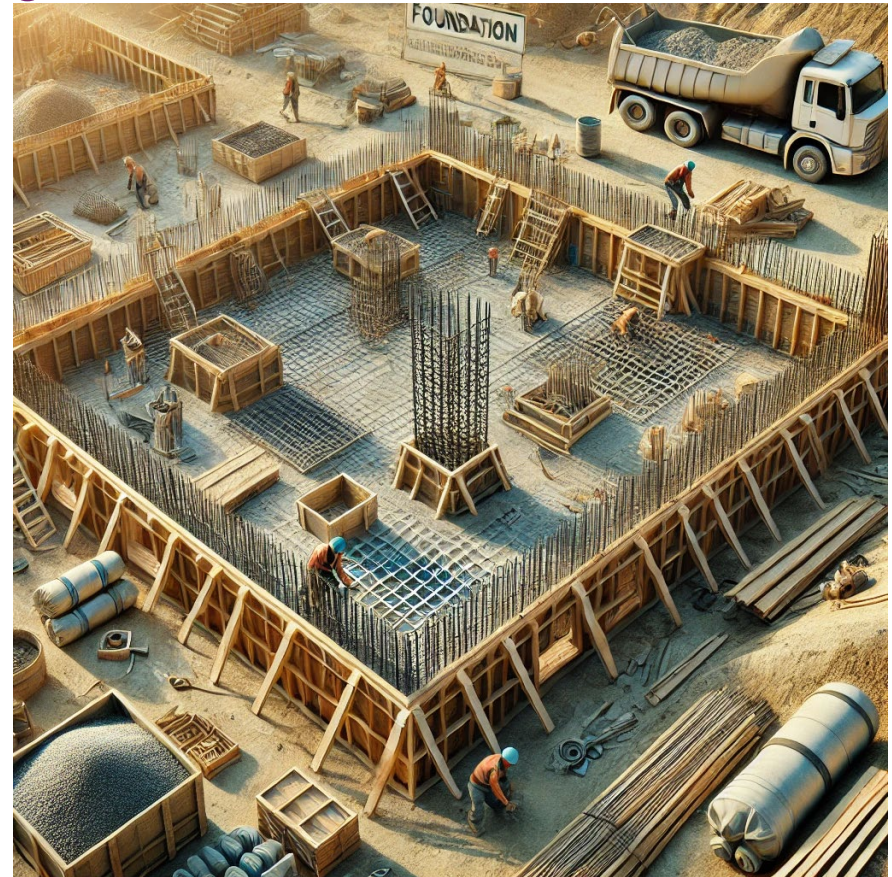
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# Foundational Mindset

# Foundational Mindset for Mastering Gen AI

Why a Foundational Mindset is critical

1. Sets the stage for ethical, responsible, and effective use of AI.
2. Essential in aligning AI usage with personal and organizational goals.





## What Is A Foundational Mindset?

*“A foundational mindset refers to the core attitudes, beliefs, and approaches that shape how you learn and apply new technologies, like Generative AI. It’s about having an open, curious, and adaptable perspective, recognizing that mastering Gen AI requires continuous learning, critical thinking, and a willingness to experiment...” ([more – chatgpt](#))*



# 1 - Absolutely NO Confidential Data

1. Importance of protecting sensitive information.
2. Understanding data privacy laws and regulations.
3. Ethical vs unethical AI use



## [Article Link](#)

1. *Exercise sound judgement*
2. *Promote responsible innovation*
3. *Valid business case for AI*
4. *See AI as a force for good*

# Ethical vs Unethical AI Use?

## Ethical

*“Ethical use of AI in accounting involves implementing AI systems transparently and responsibly, ensuring data privacy, accuracy, and fairness, while enhancing decision-making and efficiency without bias.”*

## Unethical

*“Unethical use of AI in accounting includes manipulating AI systems to falsify data, conceal financial misstatements, or unfairly target specific groups, resulting in biased or inaccurate outcomes that undermine trust and integrity.”*

[Check it out on ChatGPT](#)

## 2 - Assess Current Mindset / Skills Level

1. Self-assessment tools and techniques.
2. Identifying strengths and areas for improvement.
3. Setting realistic goals for skill development.




### Gen AI Professional Use Assessment Questionnaire

Please complete this form to help gain an understanding of where you are on Gen AI use in your professional workflow.

This survey provides a brief review of 1 - Mindset & Approach, 2 - Knowledge & Skills, 3 - Ethical & Social Awareness, and 4 - Professional & Industry Context.

This assessment tool was created by [Invenio Advisors, LLC](#) (Bill & Don Tomoff - the twinz of [#twinztalk](#)) and ChatGPT (🤖). The assessment was inspired by an [Allie K Miller LinkedIn post](#).

#### AI Augmented Workflow - The Future of Knowledge Work

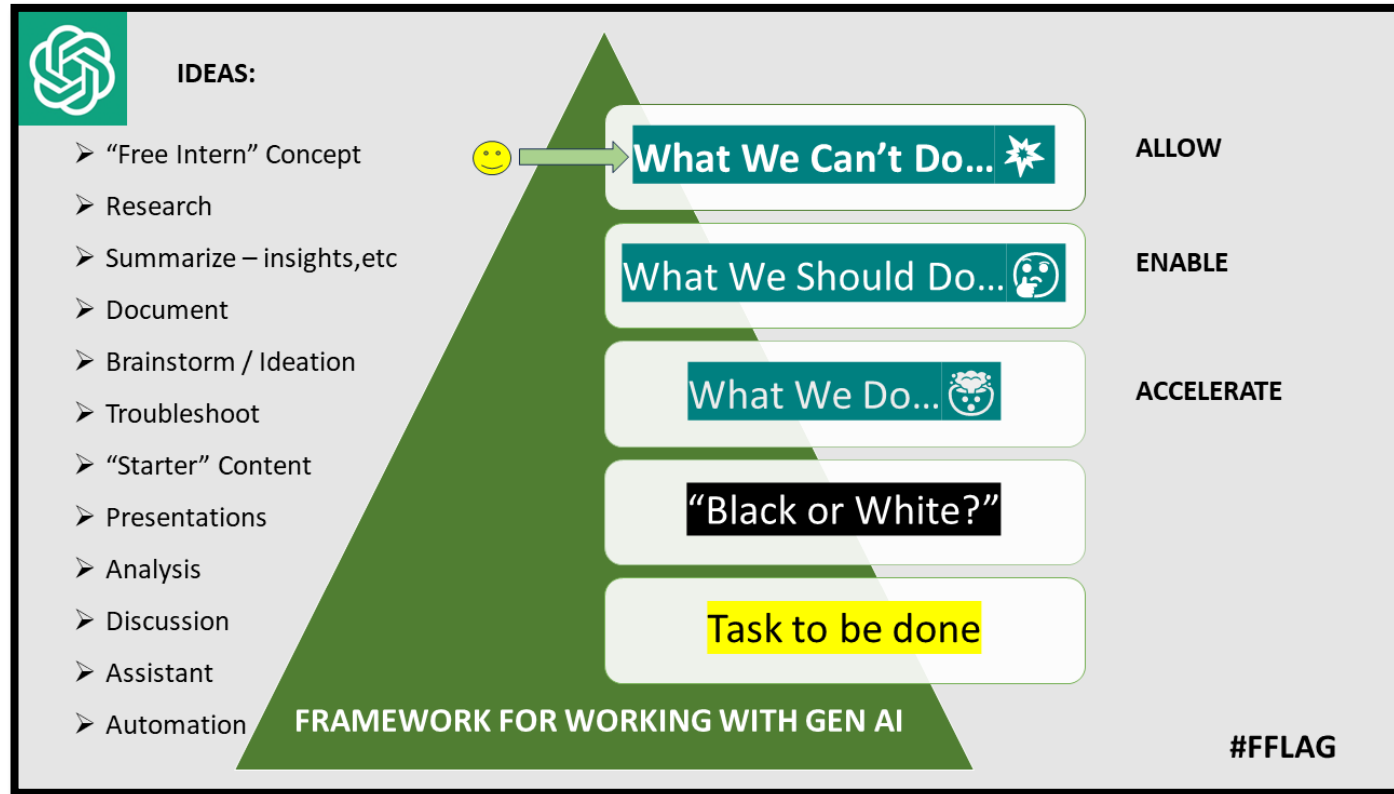
A futuristic illustration showing a hand holding a glowing blue AI interface. The interface features a large, glowing 'A' and 'I' logo. Surrounding the hand are various circular icons representing different aspects of AI and knowledge work, such as a brain, a gear, a lightbulb, and a network diagram. The background is dark with glowing blue lines and nodes, suggesting a complex digital or neural network.

### 3 - Focus Effort - #narrowthepath

1. ***Start where you are.***
2. Identify what you dislike that is repetitive/time consuming.
3. Build up to larger challenges as your skills develop!



# One Way To Approach Getting Started!



## 4 - Consistent, Everyday Effort ("AI First" mindset - Allie K Miller)


1. Incorporating AI learning into daily routines.
2. Benefits of a persistent learning approach.
3. Real-life examples of "AI First" adoption.



## 5 - Continuous Learning / Resources

1. Connor Grennan
2. Allie K. Miller
3. Ethan Mollick
4. Paul Roetzer
5. Glenn Hopper
6. Jason Staats



 Gen AI Training - Resources Handout  
Recommended Experts to Follow

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**Influencers**

*Conor Grennan*

1. Website - <https://www.ai-mindset.ai/>
2. The AI Mindset Newsletter - <https://www.ai-mindset.ai/newsletter>
3. The Truth About Prompting - <https://www.ai-mindset.ai/ai-mindset-newsletter/truth-about-prompting>
4. LinkedIn - <https://www.linkedin.com/in/conorgrennan/>
5. YouTube - <https://www.youtube.com/@ConorGrennan>

*Allie K. Miller*

1. Website AI with Allie - <https://www.alliekmiller.com/>
2. The AI with Allie Newsletter - <https://aiwithallie.beehiv.com/> (subscribe and receive 50-page FREE ChatGPT Guide)
3. AI with Allie - Becoming an AI-Enhanced Human (FREE 5-day educational email course) -

**INVENIO ADVISORS, LLC** Page 1



## 6 - Mobile Setup - Accessibility is Key!

1. Utilizing mobile devices for on-the-go use.
2. Essential apps and tools for mobile productivity.
3. Making the most of micro-learning opportunities.



## 7 - Critical Thinking and Evaluation

1. Importance of questioning AI outputs (“Hallucinations” WILL occur)
2. Techniques for evaluating AI models and tools.
3. Skepticism and thorough analysis.





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# Learning Together & Prompting



## 8 – “It Takes a Village” – Accelerate the Climb

1. Community – social media, company/friend groups, etc.
2. Collaborative learning – workshops, group challenges
3. Feedback – seek/offer feedback for skill development



## 9 – Get Personal - Start Learning with Personal Tasks

1. Start small – drafting emails, organize schedule, hobby assistance...
2. Get hands on – essential in order to learn!
3. Gain confidence – experiment in LOW risk environment.
4. Have FUN!



## Images to Assist Us!

*“Create an image of a young man looking down upon omaha beach contemplating the d-day invasion”*



*“create an image of a 2001 toyota corolla”*



## Images to Assist Us!

*“make that a subtle red corolla that is showing some wear and tear from the years of use”*



*“Please show me the engine of this car with the hood open”*



Bill Almost Lost His 2001 Corolla... 😬



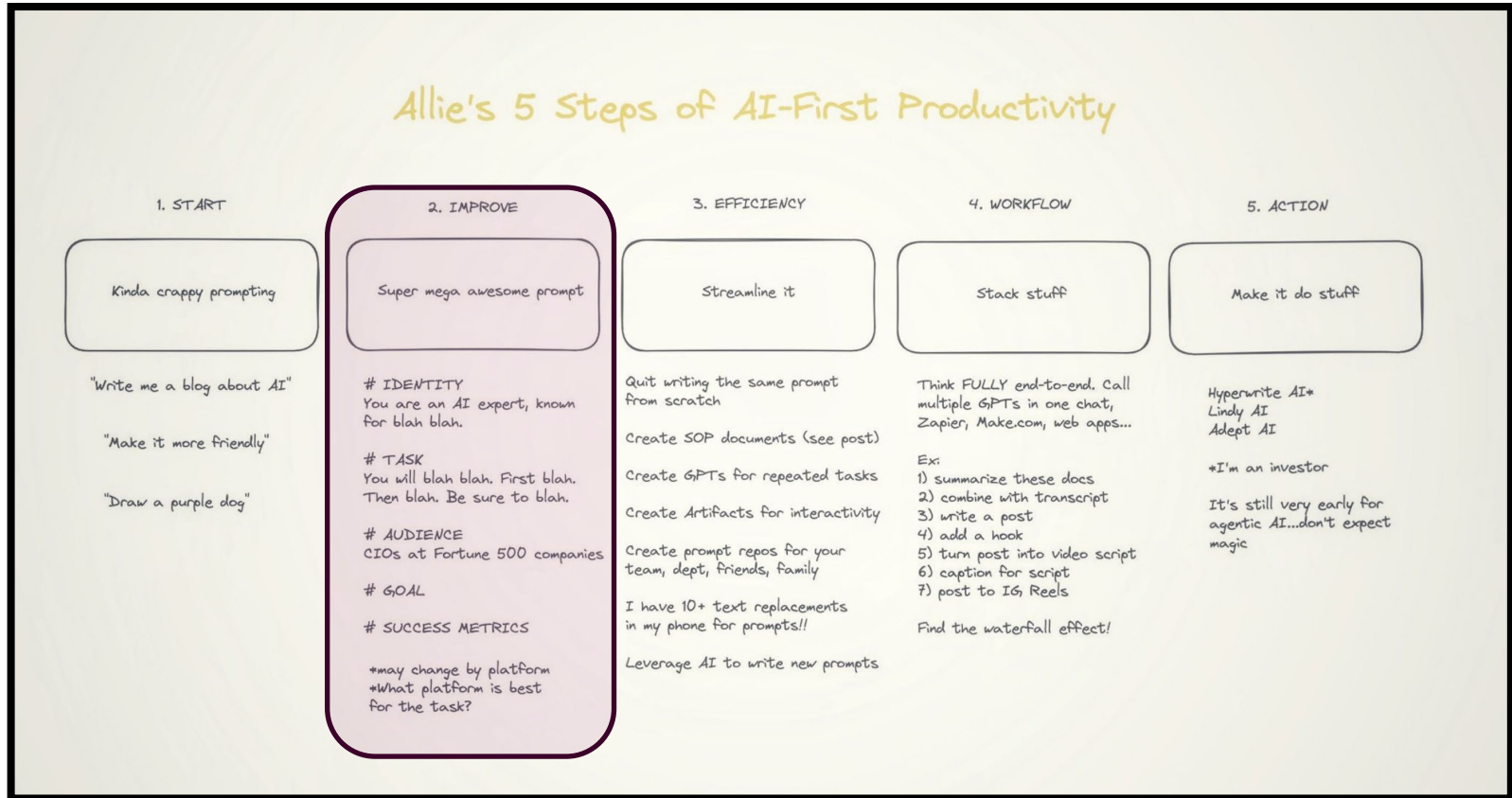


## 10 – Prompting Skills Development

1. Understand prompting – 5 prompting tips, Frameworks to consider
2. Use AI to refine and challenge your prompts
3. Understand prompt iteration & incremental (or progressive) prompting



# Allie K. Miller – AI-First Productivity Graphic – Prompting (Link)



# 11 – Develop (and Share) A Prompt Library

1. Collect & categorize
2. Share & expand
3. Adapt & reuse

**PROMPT LIBRARY - RESOURCE & DASHBOARD** INVENIO ADVISORS, LLC

TOTAL PROMPTS IN LIBRARY - 45  
TOTAL FILTERED PROMPTS - 5

1 - SELECT PROMPT FROM TABLE & CLICK HERE - UPDATES BELOW

2 - CLICK HERE TO COPY PROMPT - PASTE INTO GEN AI TOOL

You are to act as a Power Query expert and provide a review of the transformation steps for the M code I will provide you with. Group them into BASIC, INTERMEDIATE and ADVANCED items. List the transformation action in bold, skip a line and describe in basic terms what the transformation does. I want you to take a deep breath and take your time on this. It is VERY IMPORTANT that it is complete and thorough. Confirm that you understand these instructions and prompt me for the power query M code.

Prompt Purpose	Prompt	Text Replacement	Category	SubCategory	Output?
Analyze benefits of PQ Query	You are an excel PowerQuery m-code expert. P pqben		Excel	Power Query	Documentation
Comment PQ query m-code	Act as a Power Query expert and help me clean pqc1		Excel	Power Query	Documentation
Summarize PQ query process & steps	You are to act as a Power Query expert and provide pqc2		Excel	Power Query	Documentation
Explain PQ query transformation steps, Basic - Advanced	You are to act as a Power Query expert and provide pqc3		Excel	Power Query	Documentation
Create text doc for PQ query m-code	Please create a text file for the m-code I will provide pqtxt		Excel	Power Query	Text Document

**Category**  
Excel

**SubCategory**  
Power Query

**SubCategory**  
Power Query  
Automation  
Functions & Formulas  
Power Query  
Topics



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# Advanced Tips & Techniques

# 12 – Go PLUS: Exploring Advanced AI Features and Tools

## 1. #justdoit

[Click here for CNET Article Link](#)

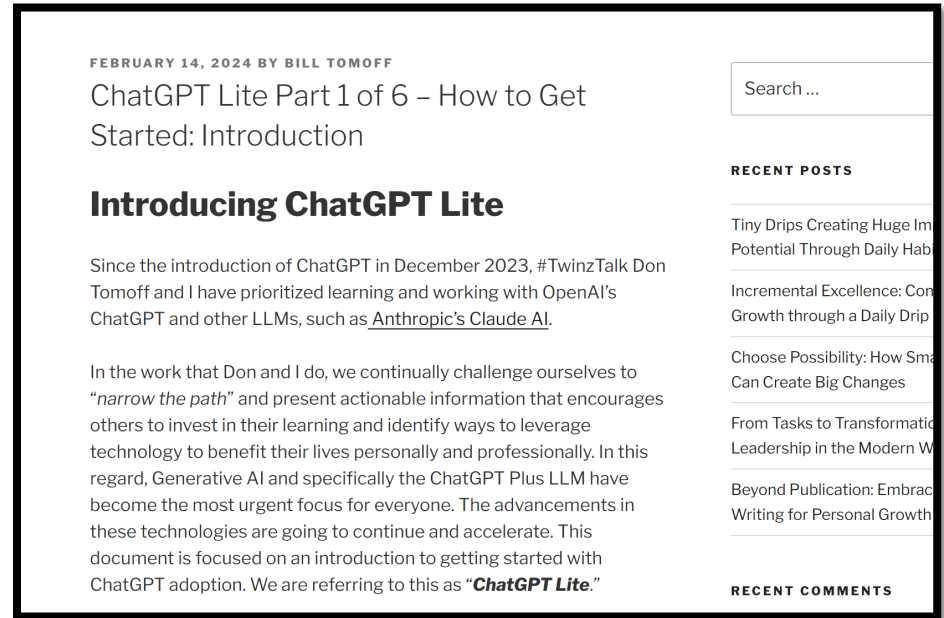
### Upgrade your plan

<p><b>Free</b> USD \$0/month</p> <p>Your current plan</p> <ul style="list-style-type: none"><li>✓ Assistance with writing, problem solving and more</li><li>✓ Access to GPT-3.5</li><li>✓ Limited access to GPT-4o</li><li>✓ Limited access to advanced data analysis, file uploads, vision, web browsing, and custom GPTs</li></ul> <p>Have an existing plan? See <a href="#">billing help</a></p>	<p><b>Plus</b> USD \$20/month</p> <p>Upgrade to Plus</p> <ul style="list-style-type: none"><li>✓ Early access to new features</li><li>✓ Access to GPT-4, GPT-4o, GPT-3.5</li><li>✓ Up to 5x more messages for GPT-4o</li><li>✓ Access to advanced data analysis, file uploads, vision, and web browsing</li><li>✓ DALL-E image generation</li><li>✓ Create and use custom GPTs</li></ul> <p>Limits apply.</p>	<p><b>Team</b> USD \$25 per person/month*</p> <p>Upgrade to Team</p> <p><b>Everything in Plus, and:</b></p> <ul style="list-style-type: none"><li>✓ Higher limits for GPT-4, GPT-4o, and tools like DALL-E image generation, advanced data analysis, web browsing, and more</li><li>✓ Create and share GPTs with your workspace</li><li>✓ Admin console for workspace management</li><li>✓ Team data excluded from training by default. <a href="#">Learn more</a></li></ul> <p>* Price billed annually, minimum 2 users</p>
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Need more capabilities? See [ChatGPT Enterprise](#)

# 13 – Start Basic – ChatGPT Lite (created by Bill & Don)

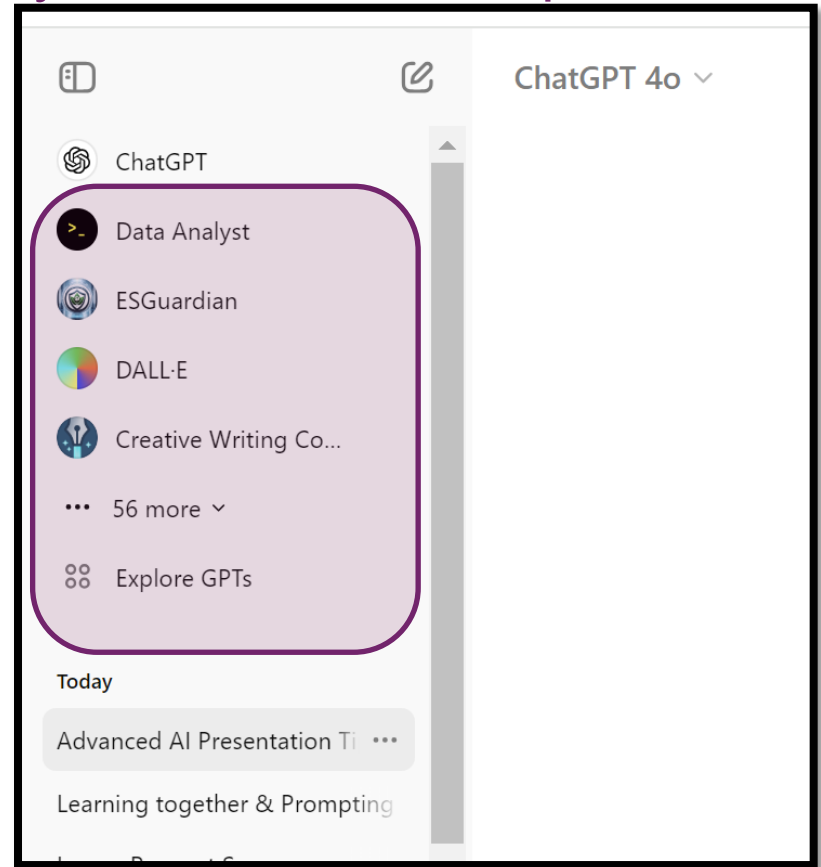
1. Perfect starting point for newcomers.
2. Build a solid foundation with just the basics
3. Learn the essentials before diving into more difficult scenarios



[Bill's Blog Post](#)

# 14 - Custom GPTs! - **EASIEST** Way to Accelerate Adoption/Use!

1. “Plug and go”
2. Need for prompting knowledge is essentially eliminated.
3. Simple, targeted use cases make them very attractive!



## Custom GPTs...

### **What?**

*Sometimes when people encounter ChatGPT, they don't know where to start. OpenAI calls it the "empty box problem." Discovering that led the company to find a way to narrow down the choices, Turley said.*


*"People really benefit from the packaging of a use case -- here's a very specific thing that I can do with ChatGPT," like travel planning, cooking help or an interactive, step-by-step tool to build a website, Turley said.*



# Custom GPTs Can Eliminate Prompting Specificity! 🤖



Excel Formula Dominator ▾



### Excel Formula Dominator

Friendly expert in Excel, avoiding technical jargon.  
Using this assistant, you will soon be dominating in  
Excel functions and formulas! 🤖

By Don Tomoff

**Tap Here!**

Provide the EFD Options

Help me create a formula

Explore Excel Functions

Recommended Resources?

Message Excel Formula Dominator...

ChatGPT can make mistakes. Consider checking important information.

**You**  
Provide the EFD Options

**Excel Formula Dominator**  
No problem! The Excel Formula Dominator has a few excellent basic options to get you started. Here they are:

- 1 - Explain an Excel Function
- 2 - Explain an Excel Formula
- 3 - Explore Excel Function categories
- 4 - Select and explain a RANDOM Excel function

Please select a number from the list and let's get started!

🗑️ 👍 🗨️ ↻

# Custom GPTs – Handouts/Resource (Plus Required)

## The Wisdom Of Charlie Munger Custom GPT

The Wisdom Of Charlie Munger ▾



### The Wisdom Of Charlie Munger

By Don Tomoff A

Blends Munger's wisdom on value investing, common sense, and lifelong learning. Created by Bill & Don Tomoff (the Twinz of #twintalk)

Provide a random quote... 🗨️

I'm new to investing. What advice would Munger prov...


Tell me about Charlie Munger.

Message The Wisdom Of Charlie Munger...

ChatGPT can make mistakes. Consider checking important information.

## Personal Document (& Image) Analyzer Custom GPT

Personal Document (& Image) Analyzer ▾



### Personal Document (& Image) Analyzer

By Don Tomoff A

I'm here to help you with your PDF documents! Need a summary? Extract content from a specific section? Extract a list of Exhibits? Sure - give it a go! This Custom GPT was developed by Bill & Don Tomoff (the #twinz)

Let's Get Started...

10 Random Insights

Message Personal Document (& Image) Analyzer...

ChatGPT can make mistakes. Consider checking important information.

# 15 - Create Use Case Tracker! Let the Ideas Flow

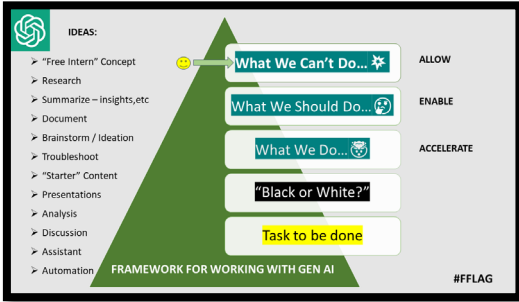
1. Document AI use cases for continuous improvement
2. Track outcomes and refine applications
3. Foster innovation by sharing use cases across teams

**Accelerate >> Wouldn't >> Couldn't (LINK)**

	A	B	C	D	E	F	G
1			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
2							
3							
4			<b>ACCELERATE 🏃</b>		<b>WOULDN'T 🤔</b>		<b>COULDN'T 🚫</b>
5	<b>SAMPLE TASKS</b>	<input type="checkbox"/>	Summarize a document	<input type="checkbox"/>	Summarize a LENGTHY document	<input type="checkbox"/>	Generate Folder / Files list from directory(s)
6		<input type="checkbox"/>	Research a topic (audit, tax, anything)	<input type="checkbox"/>	Document our Excel workbooks	<input type="checkbox"/>	Automate tasks with code (via NLP)
7		<input type="checkbox"/>	Prepare a discussion outline	<input type="checkbox"/>	Create Index sheet for Excel workbooks	<input type="checkbox"/>	Develop Add-ins using code
8		<input type="checkbox"/>	Ideation / Brainstorming	<input type="checkbox"/>	Explain complex code	<input type="checkbox"/>	Document code - VBA, Power Query, Google Scripts
9		<input type="checkbox"/>	Create spreadsheet formulas	<input type="checkbox"/>	Document formulas in spreadsheets	<input type="checkbox"/>	Create Excel LAMBDA functions
10		<input type="checkbox"/>	Simplify topics for explanation	<input type="checkbox"/>	Understand & simplify Excel formulas	<input type="checkbox"/>	Create Custom Apps (GPTs) - task simplification
11		<input type="checkbox"/>	Create a "starter" document	<input type="checkbox"/>	Create fantastic reference Resources...	<input type="checkbox"/>	Write Power Query M-Code for query development
12		<input type="checkbox"/>	Develop learning resources	<input type="checkbox"/>	- <a href="#">Allie Miller AI Assessment Tool</a>	<input type="checkbox"/>	Write complex DAX functions for Power Pivot data models
13		<input type="checkbox"/>	Data analysis	<input type="checkbox"/>		<input type="checkbox"/>	Understand & simplify automation code
14		<input type="checkbox"/>	Process documentation	<input type="checkbox"/>	Create dynamic Index for Excel workbooks	<input type="checkbox"/>	Clean data without requiring data tools knowledge
15		<input type="checkbox"/>	Create PowerPoint starter documents	<input type="checkbox"/>	Meeting summaries (Zoom, Teams)	<input type="checkbox"/>	Research / Review financial statements via weblink URL
16		<input type="checkbox"/>	<a href="#">Create outline / document framework for AI Use Policy</a>	<input type="checkbox"/>	<a href="#">Sarbanes Oxley regulations Entity Controls review analysis and testing framework</a>	<input type="checkbox"/>	Analyze images - for search, explain, document (Vision)
17		<input type="checkbox"/>	List creation from unstructured/semi-structured data	<input type="checkbox"/>	<a href="#">Document Audit Process steps and identify where Gen AI can assist</a>	<input type="checkbox"/>	Develop Unique Random Number Generator LAMBDA function
18		<input type="checkbox"/>	Troubleshoot content - formulas, code, etc.	<input type="checkbox"/>		<input type="checkbox"/>	<a href="#">Create Excel Formula Dominator GPT - Excel Formula Assistant</a>
19		<input type="checkbox"/>	Review / Reshape content	<input type="checkbox"/>		<input type="checkbox"/>	<a href="#">Create Document (&amp; Image) Analyzer GPT - Document summaries and analysis</a>
20		<input type="checkbox"/>	Draft emails, letters,	<input type="checkbox"/>		<input type="checkbox"/>	
21		<input type="checkbox"/>	Draft knowledge leadership content	<input type="checkbox"/>		<input type="checkbox"/>	

TIP #5

Identify opportunities for a “Disproportionate Advantage”



- Workflow ACCELERATION
- ENABLEs what we should do
- ALLOWs what we can't do
- ENHANCED Client services

BEST PRACTICE – SOLVE PROBLEMS!

PROFESSIONALS - TIME CONSUMING TASKS						
Number	Task	Audit	Tax	HR	Everyone	GEN AI?
1	Email Management 🔥	✓	✓	✓	✓	✓
2	Data Analysis and Reporting 🔥	✓	✓	✓	✓	✓
3	Meeting Management	✓	✓	✓🔥	✓	✓
4	Task Prioritization and Management	✓	✓	✓	✓	✓
5	Document Creation and Management 🔥	✓	✓	✓	✓	✓
6	Expense Tracking and Reporting	✓	✓	✓	✓	
7	Customer Relationship Management (CRM)	✓	✓			
8	Recruitment and Talent Management	✓	✓	✓🔥		✓
9	Compliance and Regulatory Reporting	✓	✓	✓		
10	Managing Paperwork	✓	✓	✓	✓	
11	Password Management	✓	✓	✓	✓	
12	File Management 🔥	✓	✓	✓	✓	✓
13	Using Office Software/Spreadsheet Tasks 🔥🔥	✓	✓	✓	✓	✓
14	Research	✓🔥	✓🔥	✓	✓	✓
15	Personal Knowledge Management (PKM) 🔥	✓	✓	✓	✓	✓
16	Preparing Information 🔥	✓	✓	✓	✓	✓
17	Communicating Information	✓	✓	✓	✓	
18	Collaborating with Colleagues and Clients	✓	✓	✓	✓	

# 16 – Advanced Data Analysis (“ADA”)

1. Leverage AI for complex data-driven decision-making
2. Perform preliminary analysis without all the “upfront” work!

The image displays a ChatGPT interface with a blue background. On the left, a chat window shows a prompt for a financial document review expert. The prompt asks for a summary of key insights from a filing, including a bold header, introduction, company, period, filing date, and title. It emphasizes the importance of being complete and thorough. Below the prompt, a 'PASTE LINK' is provided: <https://www.sec.gov/ix?doc=/Archives/edgar/data/789019/000095017023035122/msft-20230630.htm>. The chat response indicates that the user's instructions will be followed and a detailed introduction will be provided.

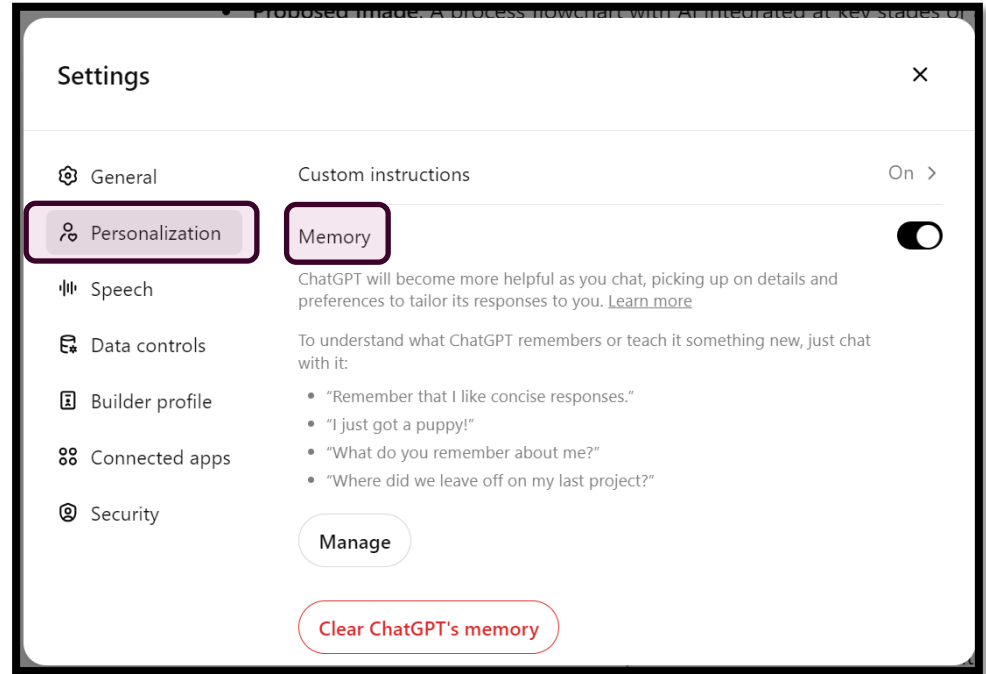
On the right, a screenshot of a Microsoft FY2023 Waterfall Chart is shown. The chart is titled 'It Even Created This Waterfall Chart!' and displays the progression from Total Revenue to Net Income. The y-axis represents Amount in billions, ranging from 0 to 200. The x-axis lists the components: Net Revenue, Cost of Revenue, Operating Expenses, Other Income (Expense), Provision for Income Taxes, and Net Income. The chart shows a green bar for Net Revenue, followed by red bars for Cost of Revenue, Operating Expenses, and Provision for Income Taxes, and a final green bar for Net Income. A legend on the right lists the values: Total Revenue: \$219.9 billion, Cost of Revenue: \$60.0 billion, Operating Expenses: \$52.7 billion, Other Income (Expense): \$16.0 billion, Provision for Income Taxes: \$19.0 billion, and Net Income: \$72.4 billion. A note at the bottom right says 'Wow. Very good. Thank you. Can you now remove the y-axis and rotated include data labels above each bar. Each data label should include \$B to indicate billions.'

Below the chart, a section titled 'NEXT - REVIEW MD&A' provides a prompt for a thorough analysis of the management's discussion and analysis section. The prompt asks for an analysis of dollar amounts and percentage increases and decreases, and includes a red box around the text 'This analysis should include the include an introduction (bold font) at the beginning, including Company, Period filing Date, title, along with the section being analyzed.' Below this, the chat response provides the following information: Company: Microsoft Corporation, Period filing Date: June 30, 2023, Title: Annual Report for Fiscal Year Ending June 30, 2023, and Section: Management's Discussion and Analysis (MD&A). The chat response also includes an 'Introduction' section.

At the bottom right, a blue box contains the text: 'ChatGPT Financial Reporting Analysis - QUICK! Overview of MSFT FY 2023 Form 10-K from the SEC Weblink'.

# 17 – ChatGPT Memory Functionality

1. Streamline processes by recalling past interactions.
2. Enhance personalization with memory capabilities.
3. Use case examples – “edt”, “fms”, “two experts”.





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# Wrap Up

## Learning Objectives (Wrap-Up)

1. Recognize and distinguish the key components of a foundational mindset for effectively utilizing generative AI and ChatGPT. ✓
2. Recall and use prompts for AI tools, including the creation and use of a prompt library to enhance productivity in daily tasks. ✓
3. Apply Custom GPTs, to address specific professional use cases while maintaining ethical standards and data confidentiality. ✓
4. Apply a strategic approach for integrating AI tools into daily workflows, including the creation of a use case tracker to identify opportunities for process improvement. ✓

*“The more that  
you read, the  
more things  
you will know.  
The more that  
you learn, the  
more places  
you’ll go.”*

*- Dr. Seuss*



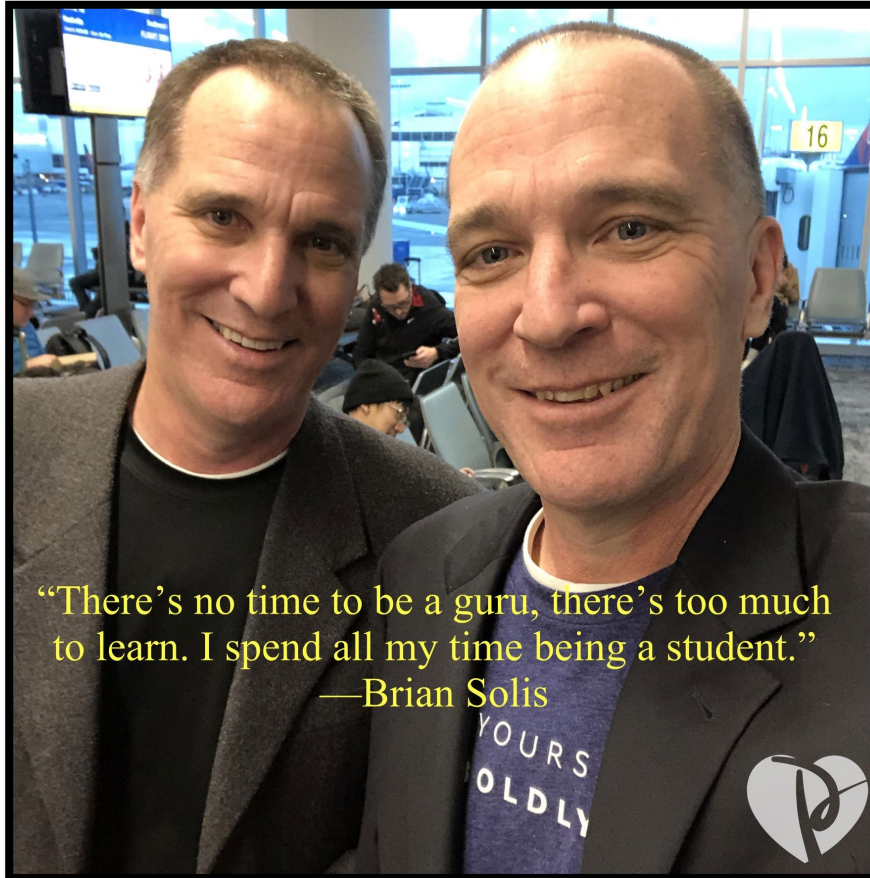
# THANK YOU!

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*“There’s no time to be a guru, there’s too much to learn. I spend all my time being a student.”*

—Brian Solis

*“There’s no time to be a guru, there’s too much to learn. I spend all my time being a student.”*

- Brian Solis



# Questions?

# What is the Business Learning Institute?

BLI is a training affiliate of the AICPA-CIMA. BLI's mission is to deliver competency-based courses, content and community that enhance learning and foster organizational and executive leadership.

BLI has grown into the largest provider of on-site training in the country. Pam and the Customized Learning Solutions team have grown the business in three core segments – Corporate, Firm and Government.

## The BLI Curricula

Today's business environment demands the need to gain competencies and share strategic knowledge. BLI delivers competency-based curriculum, courses, content, and community to enhance learning and grow intellectual capital for organizational and executive leadership.

These soft skills are essentially people skills – the non-technical, intangible, performance skills that determine your strengths as a leader, manager, and team member.

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### STRATEGIC MANAGEMENT

Strategic conversation reflects the dynamics between the organization and its environment. The closer the language reflects current and potential customer dynamics, the higher the company's profit potential.

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### LEADERSHIP DEVELOPMENT

Great leadership is one of the most valued of all human activities. Modern myth holds that "leaders are born not made," but leadership is a set of observable and learnable practices - it is the process people use when they bring out the best in others and themselves.

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### BUSINESS MANAGEMENT

As the business world moves at an incredible pace, keeping up is a key to success. Today's financial managers must be able to translate strategy to operational and corporate growth.

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### TECHNOLOGY AND COMPUTER SKILLS

Harness the technology you use every day to make your business life easier and allow you to work smarter.

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### PERFORMANCE MEASUREMENT MANAGEMENT

Executives and managers must effectively transform their firms or companies into high performance organizations and progressively identify and develop the appropriate core competencies and link them to their business strategies.

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### COMMUNICATION SKILLS

Many people in the business field cannot communicate effectively and, even more damaging, don't realize it. Success is not defined solely by a product line or service - it relies on relationships formed and maintained through skillful communications. Your competitors know this. Do you?

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### TECHNICAL EXPERTISE

Keeping up with technical competencies is a core business requirement for financial professionals. Staying attuned to the latest changes, updates, and regulations are necessary components to staying competitive in an ever-changing business environment.

*Please note that many programs in this catalog are available in webcast format. Contact a BLI Customized Learning consultant if you are interested in a webcast.*