

Accountants

3 Actions to Do Now

Reduce manual work and reclaim time for analysis

Track Where You Use Spreadsheets Outside the ERP

1

- ☐ List all the close-related tasks you still do in Excel.
 - ☐ Quick win: Start with the one that consumes the most time or causes the most friction.

Create a “Review-Ready” Workflow

2

- ☐ What steps happen before a manager reviews your entries?
- ☐ Are there comments, justifications, or supporting docs that could be surfaced automatically?
 - ☐ Prompt to explore: “What would a review-ready task look like if it came pre-tagged with variance explanations?”

Try a Prompt-Driven Task

3

- ☐ Pick one repetitive action like writing variance explanations or reviewing duplicate entries.
 - ☐ Quick win: Use the Prompting Guide to structure a clear, repeatable request that AI can handle for you.