THE ROAD TO AI IMPLEMENTATION

for accounting firms and finance teams

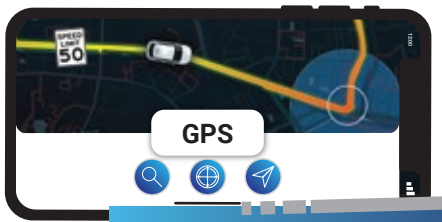
1 EXPERIMENT

Free and low-cost tools like ChatGPT and Copilot offer a chance to understand the technology's potential.

NOTE: Don't put personal identifiable information (PII) in these.

2 CONSIDER YOUR CLIENTS

Base your growth plan and strategy off their expectations. They'll expect GenAI-enabled services quickly, so be sure you're ready.



Given the accelerated pace of AI advancement, stick to a 1- to 2-year plan for now.

3 RESEARCH VENDORS

It won't be feasible for most firms to build their own tools right away. Ask current and potential solution providers about GenAI offerings, most will already have something in their product roadmap.



Ensure that humans maintain a key role to correct biases, errors or hallucinations.

4 DEFINE ACCEPTABLE USE

To establish guardrails, circulate an acceptable use policy to staff as early as possible. Among other things, this should prohibit sharing any sensitive or identifiable client information into public AI tools.

5 FIND THE RIGHT FIT

GenAI works well with text, video and image generation. Identify areas of work to reduce effort, time and costs. As the technology matures, revisit this step.

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