Practical AI for Accounting Teams

NECA Accounting Peer Group · Tuesday, October 27, 2026 · Centennial Hotel Spokane

Time	Session	What we'll do
9:00	**Welcome**	Setup check, a live poll of the room, and what you want out of the day
9:25	**How AI actually works**	What these tools are and aren't, why they're sometimes confidently wrong, and how to tell when they've looked something up
10:10	Break	
10:20	**The tool landscape**	ChatGPT, Claude, Gemini, Copilot, and the new AI agents. Your data on free vs. business plans. **Hands-on:** one question, three tools
11:00	**Working with AI**	Brief it like a coworker, iterate, get a second opinion, and sort tasks into three bins. **Hands-on:** rebuild a weak prompt
11:40	Lunch at the hotel	
12:25	**AI + Excel lab**	AI decides, Excel computes. Job-cost cleanup, pivot planning on AR aging, and catching a broken WIP formula
1:25	Break	
1:35	**From doing the work to reviewing the work**	Vendor promises, bank statements in and differences flagged, how much control to give AI over email, and an audit of your own week. **Hands-on:** build your own AI email assistant
2:30	**The workforce and what stays human**	How AI will change your role, rolling it out on a team, and measuring whether it's worth the time
2:55	**Wrap-up and take-home kit**	

If the day runs until 5:00: three more hands-on modules (making anomalies visible, splitting a cost code safely, building small custom tools), then an open lab and a Copilot clinic.

Bring: a laptop and charger, and free accounts on at least two of ChatGPT, Claude, and Gemini (or Copilot if your firm provides it). All exercise data is fictional. Please don't use real client data today.

Prompts are the fish. Thinking like AI is the fishing.

Notes