



Business Learning Institute

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Session 2: Gen AI: Practical Applications

Don Tomoff

Business Learning Institute Provider

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

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)

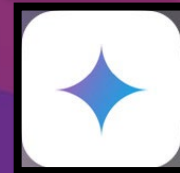
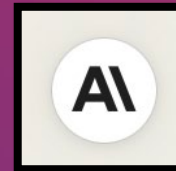
Stand Out with Your Excel Skills: Key Capabilities to Set You Apart

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



Generative AI for Accountants:

Practical Applications and Best Practices

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



Your everyday AI companion



Create a SWOT analysis about environmental goals and impact



Write some funny 'out of office' responses for my email while I'm on vacation



Outline the steps to write and publish an e-book, including marketing tips



[Terms](#) | [Privacy](#) | [FAQs](#) | [Learn more](#)

Choose a conversation style



Ask me anything...



Commercial data protection applies to this chat.



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

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 and Gen AI Basics

Why It Matters...

Challenges, Risks and Limitations

Practical Applications to Consider

Wrap Up / Resources

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

– Benjamin
Franklin

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](#)

Learning Objectives

1. Recognize what Generative AI is and identify the primary GPT models.
2. Use and be comfortable applying ChatGPT in a professional context, considering its limitations and ethical considerations.
3. Apply ChatGPT into your daily workflow to improve productivity and automate tasks.
4. Recall various Gen AI/ChatGPT practical application use cases to consider in your workplace.

*“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 and Gen AI Basics

ChatGPT



ClaudeAI

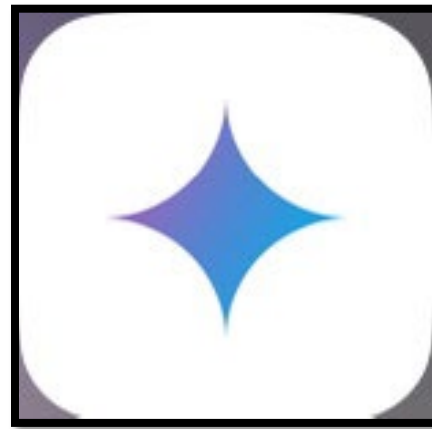


GEN AI – “BIG 4”

Co-Pilot



Gemini



EY Visual - AI

Large Language Models (LLMs) sit at the heart of GenAI, which in itself, can be categorised as a subset of Artificial Intelligence (AI).

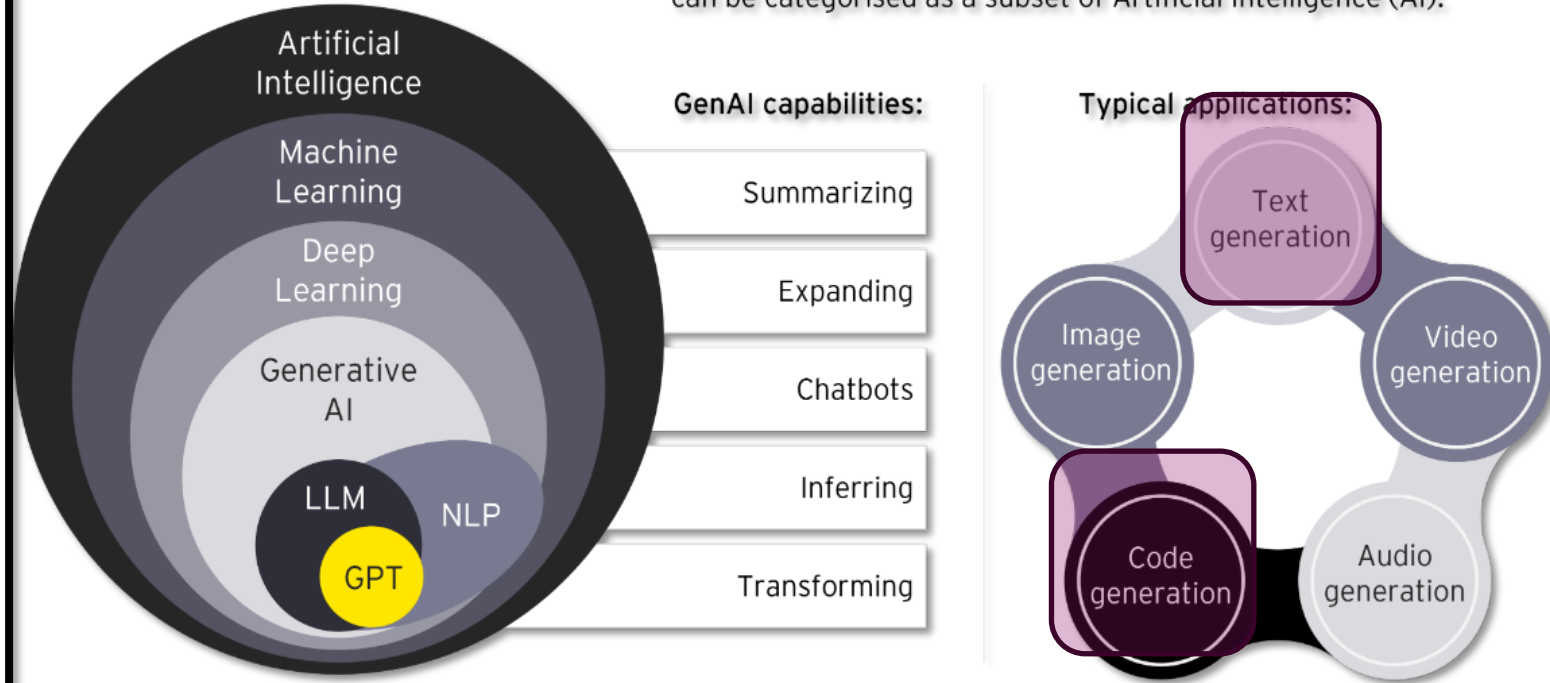


Figure 1. Understanding GenAI

Generative Pre-trained Transformer (GPT) uses a combination of LLM and Natural Language Processing (NLP) capabilities to provide a host of fundamental capabilities which find a host of generative applications.

Using AI with Microsoft Office – Co-Pilot!

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](#)

"Copilot uses next-generation AI to automate and simplify tasks."

"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 tool 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 a '35 more' dropdown. Below this is a section for 'Today' with prompts like 'Excel Help: Unclear Prompt' and 'Munger Wisdom GPT Integration'. Further down is a 'Yesterday' section with prompts like 'Sales Analysis in Excel' and 'IMAGE Index Match Calcplease'. At the bottom of the sidebar are options to 'Add Team workspace' and a user profile for 'Donald Tomoff'. A blue bracket labeled 'CUSTOM GPTs' groups the top list of GPTs. A blue bracket labeled 'CHAT THREADS' groups the 'Today' and 'Yesterday' sections. A blue arrow labeled 'ACCOUNT INFO' points to the 'Add Team workspace' and user profile section. The main area of the interface shows the OpenAI logo, the text 'How can I help you today?', and a grid of four suggested prompts: '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', and 'Plan an itinerary for a fashion-focused exploration of Paris'. A blue arrow labeled 'MESSAGE BOX PROMPTING' points to the input field at the bottom, which contains the placeholder text 'Message ChatGPT...'. A small disclaimer at the bottom reads 'ChatGPT can make mistakes. Consider checking important information.'

ChatGPT 4 ▾

CUSTOM GPTs

- ChatGPT
- Data Analyst
- ESGuardian
- DALL-E
- Creative Writing Coach
- 35 more ▾
- Explore GPTs

CHAT THREADS

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

ACCOUNT INFO

- Add Team workspace
Collaborate on a Team plan
- Donald Tomoff
Personal account

How can I help you today?

MESSAGE BOX PROMPTING

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.

How These Chat Interfaces Work

1. Pose a question or a request (this is the “Prompt”)
 - Increased professional emphasis on “prompt engineering”
2. The model will return a response
 - This is what is called “conversational” AI – you have a conversation with the tool. Build or “iterate” on your prompts.
 - The model simply returns, statistically, the next logical word in a text string. ***The model has NO knowledge!***
3. Unlike a “**search**” engine (Google, etc.), these AI tools has been referred to as “**answer**” engines.



Basic Prompt – Explain a Microsoft Excel Formula **

“Explain the following Excel formula to me”

** *Practical Application #1*

Advanced Prompt – Explain a Microsoft Excel Formula – Part 1

[Link to Sample Formula & Prompt – Demo Purposes](#)

“You are a Microsoft Excel formula expert. I want you to help me understand and document Excel formulas that I direct you on. I have a solid understanding of Excel, but some formulas I want to document and understand more fully.

Your response should be structured as follows:

(All headings should be bold!)

Purpose of Formula

[Please Insert the formula I provide here,

insert a blank row, paste formula, then insert another blank row]

Then, briefly Explain what the formula does. This is IMPORTANT- I want the user to have an understanding of what is being accomplished!

Benefits of This Formula

*Commentary - please provide a comprehensive list of benefits, in bullet point form. Please provide a brief bold intro point for each bullet point. - **continued***

Better Prompt – Explain Excel Formula – Part 2

Continued...Functions Used

[For each function, I want you to provide a Bold header, with function syntax, then skip a row and explain what the function does]

Improvement Ideas

Commentary - if you have any suggestions for how to improve this formula, include them here. If not, omit this section from the response.

URLs for Reference

Include each function with a link to the ExcelJet website for each function.

Once I provide the formula, please take a deep breath before responding.

Finally, I do not want you to include the word “commentary” in the response. Simply provide the explanation. I also do not want (This should be bold) to appear in the text - this is important!

Confirm that you understand what I want and prompt me for the Excel formula.”



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Why It Matters...



Business Leaders
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*“If you don’t
know AI, you
are going to
fail. Period.
End of story.”*

– Mark Cuban



[Mark Cuban Perspective on AI – 38 seconds](#)



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*“Every business
looks
inefficient to
you...”*

– Paul Roetzer

Christian J. Ward
Chief Data Officer, Veeva

Paul Roetzer
Founder and CEO, Marketing AI Institute

Every business just looks inefficient to you." - in the face of #AI. Paul Roetzer (Marketing AI Institute) discusses why understanding AI fundamentally changes your business perspectives. ...see more

AI LITERACY IS SO KEY

1:17



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40%

Share ➞

Generative AI can improve a highly skilled worker's performance by as much as 40% compared with workers who don't use it.

<https://mitsloan.mit.edu/ideas-made-to-matter/how-generative-ai-can-boost-highly-skilled-workers-productivity>



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Challenges, Risks and Limitations

There are Risks / Downsides! - 2

1. There ARE scary risks and ramifications to this technology!
 - [“the total decoding and synthesizing of reality” - Harold Jarche](#)
2. NO confidential information!!
 - [Mind your language: The risks of using AI-powered chatbots like ChatGPT in an organization | VentureBeat](#)
3. Knowledge base IS NOT current – web browsing is available under the Premium plan
4. **DON'T just trust it** - it makes things up

“We must address, individually and collectively, moral and ethical issues raised by cutting-edge research in artificial intelligence and biotechnology, which will enable significant life extension, designer babies, and memory extraction.”

- Klaus Schwab



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There are Risks / Downsides! - 2

5. Always test results, if possible (Hallucinations)
6. UNDERSTAND the topic you're inquiring about!
7. Critical thinking 🤔 is essential!

"I'm increasingly inclined to think that there should be some regulatory oversight, maybe at the national and international level, just to make sure that we don't do something very foolish. I mean with artificial intelligence we're summoning the demon."

- Elon Musk



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Considerations to Be Aware of / Educated On

1. Data Privacy and Security
2. Bias and Discrimination
3. Quality of Output (aka, “hallucinations”)
4. Lack of Explainability
5. Ethical Considerations
6. Legal and Regulatory Compliance
7. Knowledge Limitations



Number 1 RISK?

- DOING NOTHING!
- RONI – Risk of Not Investing

“Failing to invest in employee training can result in a workforce that lacks the skills and knowledge required to keep up with industry advancements.

This puts companies at a disadvantage, limiting their ability to innovate, respond to market changes, and deliver exceptional products or services.”

-- Graham Townley ([Article Link](#))



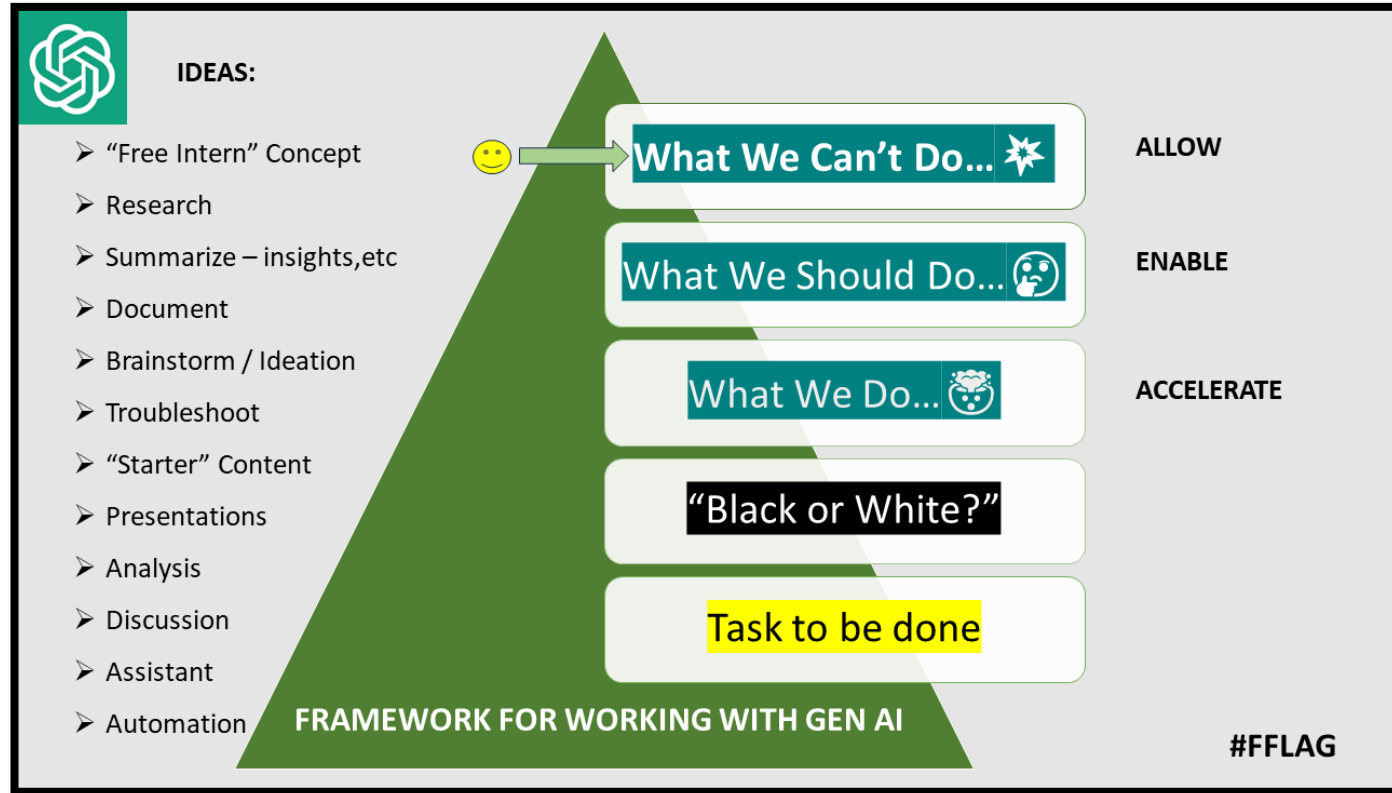


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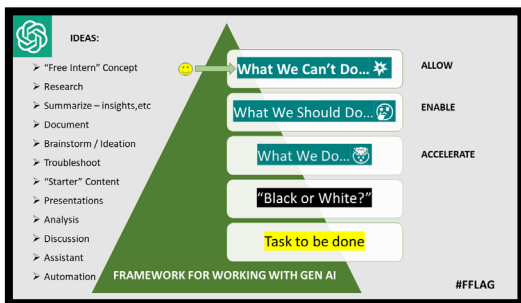
Practical Applications to Consider

One Way To Approach Getting Started!



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	✓	✓	✓	✓	

Poll - Searching for Files?

How much time do you spend looking for or accessing files?

1. Too much. It's painful
2. It's a lot, but I've gotten good at it.
3. Not much. I have a clean folder structure, shortcuts & quick access set to what I need.
4. VERY little. I search and instantly locate what I need.

Folder/File List Developed with Assistance of ChatGPT?



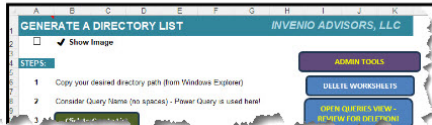
ChatGPT_Advantages of a Folder/File Directory List

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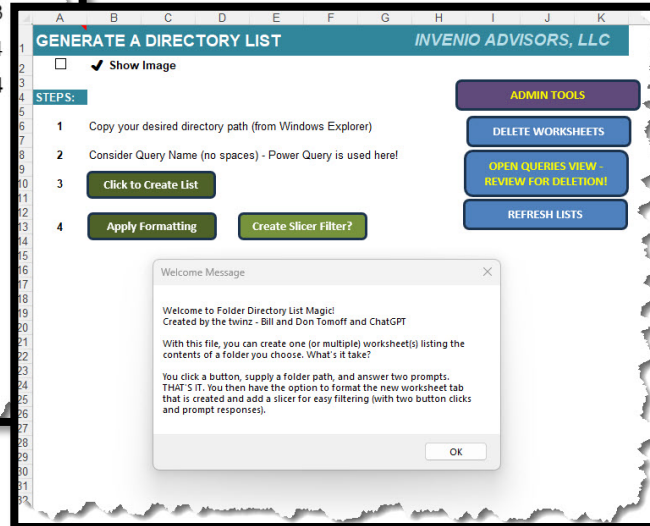
Overview

A resource that my brother Bill ([LinkedIn](#)) and I ([LinkedIn](#)) make available to clients and learning participants is an Excel model that automatically generates lists of content contained in a user's computer (the user selects the folder to generate a list).



[Click Link to Open Form](#)

Request Excel File



Use Case Categories – 35 Examples!

1. [Explain \(simplify\) a Complex Topic](#) – (3)
2. [Images to Text \(using *Vision*\)](#) – (3)
3. [Data Transformation & Analysis \(ADA\)](#) – (5)
4. [Summarize Content](#) – (3)
5. [Create DRAFT Content](#) – (2)
6. [Human Resources Assistant](#) (4)
7. [Research Assistant](#) – (2)
8. [Create Complex Formulas](#) – (4)
9. [Imagine \(and Create\) the Possibilities](#) – (8)
10. [Final thought – ADD VALUE](#) (1)



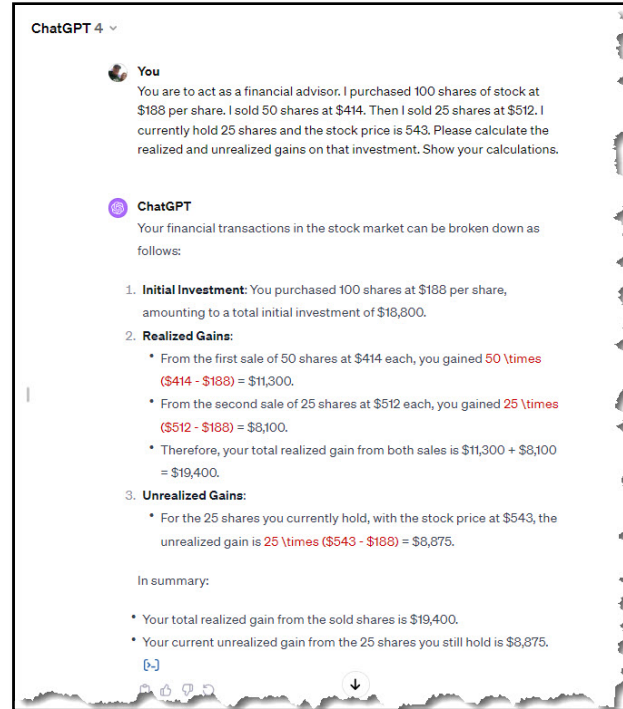
*Pick a
topic!
Let's get
started...*

Explain (Simplify) a Complex Topic – 1 (Calc)

Ok, not really complex – but
prepare a calculation!

Prompt:

“You are to act as a financial advisor. I purchased 100 shares of stock at \$188 per share. I sold 50 shares at \$414. Then I sold 25 shares at \$512. I currently hold 25 shares and the stock price is 543. Please calculate the realized and unrealized gains on that investment. Show your calculations.”



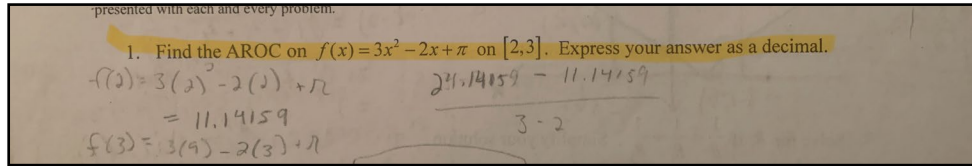
[ChatGPT Thread Link](#)

Calculate Gains on a financial transaction – structured in a logical, clearly understandable format.



Explain (Simplify) a Complex Topic – 2 (Vision)

Upload Image



Prompt –

“Please walk me through the process to solve the highlighted equation.”

You

presented with each and every problem.

1. Find the AROC on $f(x) = 3x^2 - 2x + \pi$ on $[2, 3]$. Express your answer as a decimal.

$f(2) = 3(2)^2 - 2(2) + \pi$
 $= 11.14159$

$f(3) = 3(3)^2 - 2(3) + \pi$
 $= 21.14159$

$\frac{21.14159 - 11.14159}{3 - 2}$

Please walk me through the process to solve the highlighted equation.

ChatGPT

To find the average rate of change (AROC) of the function $f(x) = 3x^2 - 2x + \pi$ on the interval $[2, 3]$, you follow these steps:

1. Calculate the value of the function at the beginning of the interval: $f(2)$.
2. Calculate the value of the function at the end of the interval: $f(3)$.
3. Subtract $f(2)$ from $f(3)$ to find the change in $f(x)$ over the interval.
4. Subtract 2 from 3 to find the change in x over the interval.
5. Divide the change in $f(x)$ by the change in x to get the AROC.

Here is the calculation:

Solve a mathematical problem – I have NO idea – so verification is CRITICAL! (btw, Done 🌟)

Explain (Simplify) a Complex Topic - 3

Understand the Polar Vortex...?

Prompts:

“You are to act as a meteorologist and weather expert. Please explain what polar vortex is. Explain it in terms a high school student can easily understand.”

Next? Translate my son’s explanation...

“Translate the following explanation into something I can understand- The polar vortex is an actual circulation feature of the climate system. It gets disrupted during stratospheric warming events and propagates energy downward into the troposphere. Which forces high pressure onto the Arctic and then dislodges cold air southward.”

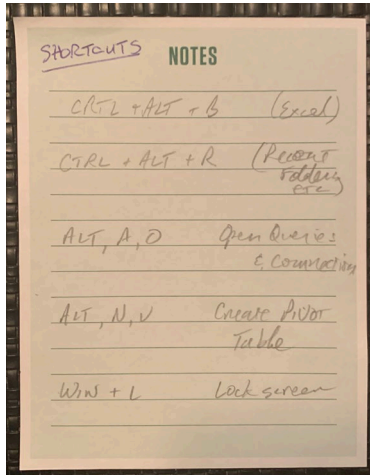
[ChatGPT Thread Link](#)

*Understand and
simplify a
meteorology topic
– Explain and
simplify Polar
Vortex*



Image to Text – 1 (Vision)

Upload Image



Prompt –

“Please explain the contents of this image to me.”



ChatGPT

Certainly, the modified list according to your corrections is as follows:

1. **CTRL + ALT + B** (Excel)
2. **CTRL + ALT + R** (Recent Folders, etc.)
3. **ALT + A + O** (Open Queries & Connections)
4. **ALT + N + V** (Create Pivot Table)
5. **WIN + L** (Lock screen)

*The ability to convert notes to a text list is **OUTSTANDING**.*

In this case, not entirely accurate, but easily corrected and completed with a second prompt.



Image to Text – 2 (Vision)

#twinztalk Tip #1153 - From
Image to Excel List with
ChatGPT – on MOBILE.

Prompt:

*“[Screenshot and upload image]
“Please create a table list
from the attached image. I
would like columns for
Category, Description and
Link. Show me the first few
rows of the table, and if
good, I will want the full list
exported to an Excel .xlsx
file. Do you understand?”*

*This Image to Excel
file conversion was
handled on an iPhone
– emphasizing work
can happen anywhere!*

LinkedIn List Image >> Excel List (On my Phone!)

1 **FUNDAMENTALS**
accounts - <https://bit.ly/3kxw4x5>
of credit - <https://bit.ly/325d4qg>
3. Cash vs. Accrual accounting - <https://bit.ly/321u70p>
4. Accounting principles - <https://bit.ly/3271Mh9>
5. Accounting cheat sheet - <https://bit.ly/32Dq4qg>
6. A guide to finance and accounting - <https://bit.ly/32zqgAA>
7. Accounting on a one-pager - <https://bit.ly/32LChgq5>

ACCOUNTING ENTRIES
8. Revenue types - <https://bit.ly/32Q0xmh>
9. COGS vs. OPEX - <https://bit.ly/323d4qg>
10. CAPEX vs. OPEX - <https://bit.ly/32289YKx>
11. Other income and expenses - <https://bit.ly/32V5a4C>
12. Asset types - <https://bit.ly/32V9YD2z>
13. Owner's equity - <https://bit.ly/32V9YD2z>
14. Liability types - <https://bit.ly/32V9YD2z>
15. Common journal entries - <https://bit.ly/32V9YD2z>

FINANCIAL STATEMENTS
16. Financial statements 101 - <https://bit.ly/32K4P90>
17. Financial statements in 2 min - <https://bit.ly/32K4P90>
18. The accounting equation - <https://bit.ly/32K4P90>
19. The income statement - <https://bit.ly/32K4P90>
20. The balance sheet - <https://bit.ly/32K4P90>
21. The cash flow statement - <https://bit.ly/32K4P90>

2 ChatGPT 4 -
Please create a table list from the attached image. I would like columns for Category, Description and Link. Show me the first few rows of the table, and if good, I will want the full list exported to an Excel .xlsx file. Do you understand?

3 ChatGPT 4 -
The extracted table from the image is as follows:

Category	Description	Link
ACCOUNTING FUNDAMENTALS	Chart of accounts	https://bit.ly/32K4P90
ACCOUNTING FUNDAMENTALS	Debit and credit	https://bit.ly/325d4qg
ACCOUNTING FUNDAMENTALS	Cash vs. Accrual accounting	https://bit.ly/321u70p
ACCOUNTING FUNDAMENTALS	Accounting principles	https://bit.ly/3271Mh9
ACCOUNTING FUNDAMENTALS	Accounting cheat sheet	https://bit.ly/32Dq4qg
ACCOUNTING FUNDAMENTALS	A guide to finance and accounting	https://bit.ly/32zqgAA
ACCOUNTING ENTRIES	Accounting on a one-pager	https://bit.ly/32LChgq5
ACCOUNTING ENTRIES	Revenue types	https://bit.ly/32Q0xmh
ACCOUNTING ENTRIES	COGS vs. OPEX	https://bit.ly/323d4qg
ACCOUNTING ENTRIES	CAPEX vs. OPEX	https://bit.ly/32289YKx
ACCOUNTING ENTRIES	Other income and expenses	https://bit.ly/32V5a4C
ACCOUNTING ENTRIES	Asset types	https://bit.ly/32V9YD2z
ACCOUNTING ENTRIES	Owner's equity	https://bit.ly/32V9YD2z
ACCOUNTING ENTRIES	Liability types	https://bit.ly/32V9YD2z


4 ChatGPT 4 -
The Financial Statements category was not properly identified. Also, certain descriptions were incomplete. Please double check your work and create the export again. Take a deep breath and take your time before responding.


5 ChatGPT 4 -
I have corrected the categorization and descriptions. The FINANCIAL STATEMENTS category is now properly identified, and incomplete descriptions have been completed. The updated table has been exported to an Excel file.

You can download the corrected file using the following link: <https://bit.ly/32K4P90>

Enter text or formula here

Image to Text – 3 (Vision)

 You



Please explain this image to me and help me understand the message it is trying to convey.

Prompt:

“Please explain this image to me and help me understand the message it is trying to convey.”



ChatGPT

The image appears to be a screenshot of a table from a spreadsheet, with the title "PROFESSIONALS - TIME CONSUMING TASKS". The table is structured to categorize various tasks by their relevance to certain professional roles or groups, and it indicates whether generative AI (denoted as "GEN AI?") can assist with these tasks. Here's a breakdown of the columns and their possible meanings:

- Number:** A simple numerical list of tasks for quick reference.
- Task:** A list of common professional tasks, likely those identified as time-consuming.
- Audit, Tax, HR:** These columns seem to indicate whether the task is relevant to professionals in auditing, taxation, and human resources respectively. A checkmark (✓) signifies relevance.
- Everyone:** This column suggests that the task is universal and relevant to all professionals, not just those in specialized roles.
- GEN AI?:** This column seems to be indicating whether generative AI can be utilized for the task. A green checkmark indicates "yes," while an orange droplet-shaped icon suggests either a limitation or that generative AI may partially assist with the task.

The presence of the droplet-shaped icon could indicate tasks that are more nuanced or require human judgment, thus generative AI might only support rather than fully automate these tasks.

The table is color-coded and utilizes icons to convey information quickly and visually. The use of green suggests a positive or affirmative action (AI can help), whereas orange suggests caution or a limitation. The overall message is to show how generative AI can impact professional work by taking on time-consuming tasks, which could lead to efficiency gains and a potential shift in how professionals allocate their time.



Help me understand this visual...upload image and go.



**Business Learning
Institute**

Powered by AICPA & CIMA

Data Transformation & Analysis (ADA) - 1

[#twintalk Tip #1007](#) -

[#ai](#) and [#chatgpt](#) solving challenges #3 -
turn a list into a resource.

Starting Prompts –

- 1 - “Create a table from the following - Function and comment should be the column headings. [Pasted in text from Anders LinkedIn post]”
- 2 - “Add columns for Function syntax and ExcelJet URL. Complete those sections”

Convert a LinkedIn post text list to an organized list in an Excel spreadsheet – with ONE prompt!

ChatGPT to Create Excel Function Reference

Function	Comment	Syntax	ExcelJet URL
SUMIFS	Sum up values in a range that meet multiple criteria	SUMIFS(SumRange, criteria1, criteria1_range, criteria2, criteria2_range, ...)	SumIFS Function
IFERROR	Checks if a formula returns an error and returns a specified value if it does	IFERROR(value, value_if_error)	IFERROR Function
XIRR	Calculates the internal rate of return for a series of cash flows that may not be periodic	XIRR(values, dates, [guess])	XIRR Function
NPV	Calculates the net present value of an investment based on a specified rate of return and a series of cash flows	NPV(rate, values, dates)	NPV Function
PMT	Calculates the periodic payment for a loan with a fixed interest rate and fixed term	PMT(rate, nper, pv, [fv], [type])	PMT Function
SLOPE	Calculates the slope of a linear regression line based on a given data set	SLOPE(known_y's, known_x's)	SLOPE Function
XLOOKUP	Searches for a value in a table or range and returns a corresponding value in the same row or column	XLOOKUP(lookup_value, lookup_array, return_array, [match_mode], [search_mode])	XLOOKUP Function
INDEX & MATCH	Searches for a value in a table or range and returns a corresponding value from a different row or column	INDEX(array, row_num, [column_num]) MATCH(lookup_value, lookup_array, [match_type])	INDEX Function & MATCH Function
EDMONT	Returns the date of the last day of the month that is a specified number of months before or after a given date	EDMONT(start_date, months)	EDMONT Function
SEQUENCE	Generates a sequence of numbers according to specified parameters	SEQUENCE([rows], [columns], [start], [step])	SEQUENCE Function

[#twintalk](#)

Powered by AICPA & CIMA

Data Transformation & Analysis (ADA) - 2

#twinztalk Tip #1130 -

Using [#chatgpt](#) Advanced Data Analysis to create [#Excel](#) files. 🤖

Prompt –

"I am going to provide you with text related to pivot table tips that I created. I would like you to organize the data into a spreadsheet format consisting of the following columns - Level (Basic, etc), Item No., Tip, and Description. Please create a sample table format for me to review, and if I give the ok, I want an Excel spreadsheet created and a download link provided. Do you understand?"

Convert a text list to an organized list in an Excel spreadsheet – with ONE prompt!

ChatGPT Tips... >> ADA >> Excel List File

FROM THIS >> TO THIS

BASIC

1. Start with Clean Data
 - Ensure your data is clean, with no blank rows or columns, for a more accurate and manageable Pivot Table.
2. Properly Structure Data and Provide in an Excel Table Format
 - Before creating a Pivot Table, it's crucial to have your data well-structured and formatted as an Excel table. This ensures that Excel's "Recommended PivotTables" feature suggests layouts, offering a quick introduction to Pivot Table capabilities. Refresh your Pivot Table when your data changes by right-clicking anywhere in the table and selecting "Refresh."
3. Use the "Recommended PivotTables" Feature
 - Excel's "Recommended PivotTables" option suggests layouts, offering a quick introduction to Pivot Table capabilities.
4. Refresh Data Regularly
 - Refresh your Pivot Table when your data changes by right-clicking anywhere in the table and selecting "Refresh."
5. Use the "Show Values As" dropdown to perform calculations like percentages or running totals automatically.
6. Double-Click to Drill Down
 - Double-click on a data point to open a new sheet showing the underlying data, useful for quick audits.
7. Use the Field List Effectively
 - Familiarize yourself with the Field List to drag and drop fields into different areas, making it easier to customize your Pivot Table.
8. Rename Fields for Clarity
 - Rename the fields in your Pivot Table for better readability and understanding, especially when...

FROM THIS

Level	Item No.	Tip	Description
Basic	1	Start with Clean Data	Ensure your data is clean, with no blank rows or columns, for a more accurate and manageable Pivot Table.
Basic	2	Properly Structure Data and Provide in an Excel Table Format	Before creating a Pivot Table, it's crucial to have your data well-structured and formatted as an Excel table. This ensures that Excel's "Recommended PivotTables" feature suggests layouts, offering a quick introduction to Pivot Table capabilities.
Basic	3	Use the "Recommended PivotTables" Feature	Refresh your Pivot Table when your data changes by right-clicking anywhere in the table and selecting "Refresh."
Basic	4	Refresh Data Regularly	Refresh your Pivot Table when your data changes by right-clicking anywhere in the table and selecting "Refresh."
Basic	5	Use the "Show Values As" dropdown to perform calculations like percentages or running totals automatically.	Use the "Show Values As" dropdown to perform calculations like percentages or running totals automatically.
Basic	6	Double-Click to Drill Down	Double-click on a data point to open a new sheet showing the underlying data, useful for quick audits.
Basic	7	Use the Field List Effectively	Familiarize yourself with the Field List to drag and drop fields into different areas, making it easier to customize your Pivot Table.
Basic	8	Rename Fields for Clarity	Rename the fields in your Pivot Table for better readability and understanding, especially when sharing with others.
Intermediate	9	Use Value Filters	Apply value filters to focus on the most relevant data, such as top 10 items or items above a certain threshold.
Intermediate	10	Group Data	Group rows or columns to summarize data, like grouping dates by month, quarter, or year.
Intermediate	11	Use Slicers for Easy Filtering	Slicers are visual filters that make it easier to filter data in your Pivot Table.
Intermediate	12	Apply Conditional Formatting	Use conditional formatting to identify trends or anomalies quickly.
Intermediate	13	Use Calculated Fields	Add your own formulas within a Pivot Table through Calculated Fields.
Intermediate	14	Sort and Filter with Custom Lists	Use custom lists for sorting your Pivot Table to a specific, non-alphabetical order.
Intermediate	15	Leverage Data Bars and Color Scales	Use data bars or color scales under conditional formatting to make your Pivot Table more visually informative.
Intermediate	16	Enable "PivotTable Update"	Use the "PivotTable Update" option when making multiple changes to avoid refreshing the Pivot Table after each change.
Intermediate	17	Use the "Search" in Field List	Utilize the search function in the field list to quickly find the fields you want to add, especially in large datasets.
Advanced	18	Create a Pivot Chart	Pivot Charts offer dynamic data visualization that updates in real-time as you modify the Pivot Table.
Advanced	19	Use GETPIVOTDATA Function	Retrieve specific data from a Pivot Table for dashboards or VBA.
Advanced	20	Enable "Show Items with No Data"	Show all items, including those with no data, to identify gaps or missing information.
Advanced	21	Use Multiple Data Sources	Create Pivot Tables from multiple data sources using the "Data Model" feature for complex analysis.
Advanced	22	Implement Macros for Automation	Automate repetitive tasks by implementing VBA macros.
Advanced	23	Use Power Query for Data Transformation	Use Power Query to clean and transform your data before creating a Pivot Table.
Advanced	24	Utilize Timelines for Date Fields	Timelines allow easy filtering of date fields by days, months, quarters, or years.
Advanced	25	Leverage "Calculated Items" for Complex Calculations	Use Calculated Items to perform calculations within a specific field.

#twinztalk
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Data Transformation & Analysis - 3

Create a proper data set and share report – survey results

[#twinztalk Tip #1135](#) - Using #chatgpt Advanced Data Analysis to quickly rearrange data for sharing.

Prompt:

“Please analyze this dataset. I then want you to rearrange it to show the questions down the left hand side, names in columns, and the rating value under their names in the column. Show me a sample of the converted data and, once I ok it, please output the data as an Excel file.”

ChatGPT ADA Generates Preferred Data Structure

The image illustrates the process of converting survey data into a structured Excel format. It features a laptop screen showing a survey interface, a smartphone displaying a list of 41 questions, and a tablet displaying the resulting Excel spreadsheet. The spreadsheet has questions listed in the first column and names in the subsequent columns, with rating values entered in the cells. A text box indicates 'Upload Excel file >> 2 prompts'.

Data Transformation & Analysis - 4

[#twinztalk Tip #1062](#) - Harnessing the power of **Code Interpreter*** with ChatGPT to perform quick, insightful

Task:

Utilized just three prompts with **Code Interpreter*** to perform advanced operations:

- 1 - Cleaned and structured the data for analysis. This performance was stunning to me.
- 2 - Generated a base 100 analysis line chart, allowing for easy comparison of different stock performances.
- 3 - Modified the visualization by changing the color of a particular line.



Convert historical stock prices for a group of stocks to a "base 100" trend line analysis

* **Code Interpreter** is now referred to as **Advanced Data Analysis (ADA)**

Data Transformation & Analysis - 5

SEC filings
analysis via
URL website
link

Harnessing the power of
Advanced Data Analysis
with ChatGPT to perform
quick, insightful analysis

Task:

1. *Identify Form 10-K SEC filing on SEC website and retrieve URL to HTML document.*
2. *Analyze the document and generate visualizations based on prompts.*



**ChatGPT Financial Reporting
Analysis - QUICK!**

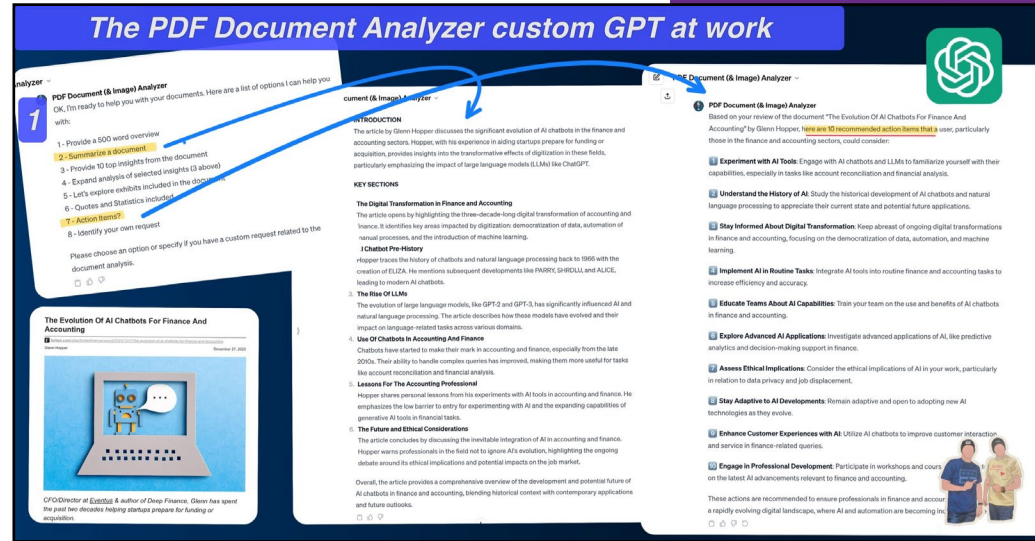
**Overview of MSFT FY 2023
Form 10-K from the
SEC Weblink**

Summarize Content...Quickly – 1 (GPT)

Summarize a PDF document using my custom GPT (PDF Document (& Image Analyzer))

#twintalk Tip #1147 - Create custom GPTs to simplify YOUR workflow processes.

The **EASIEST** way to summarize documents or images... 🤖



Summarize Content...Quickly – 1.1 (GPT)

WITHOUT GPT?

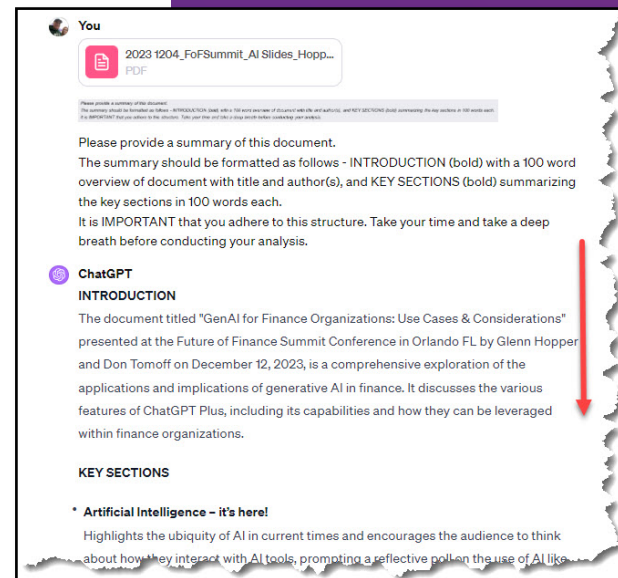
Use the following prompt to summarize a document.

Please provide a summary of this document.

*The summary should be formatted as follows -
INTRODUCTION (bold) with a 100 word overview of
document with title and author(s), and **KEY SECTIONS**
(bold) summarizing the key sections in 100 words each.*

*It is IMPORTANT that you adhere to this structure. Take
your time and take a deep breath before conducting
your analysis.*

*The non-GPT way
to summarize
documents or
images... 😊*



[ChatGPT Thread Link](#)

[Return to "Use Case Categories"](#)



Summarize Content...Quickly – 2 (Vision)

#twinztalk Tip #1166 - Using

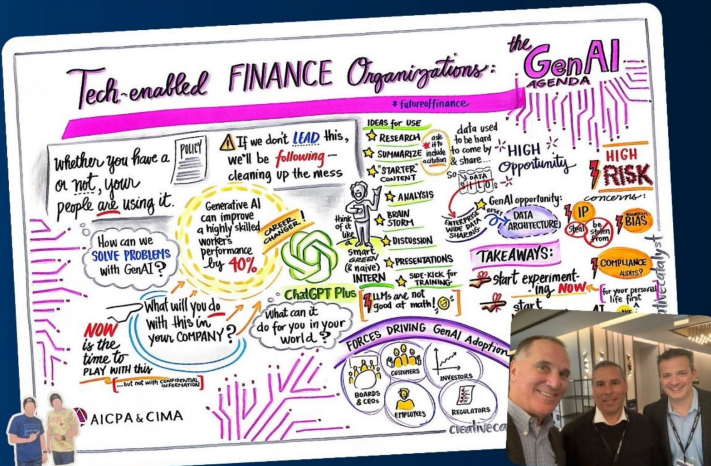
ChatGPT for image analysis -
put to the test!

Absolutely Remarkable!

Summarize a
complex image?

No problem!

ChatGPT Analysis of a Sketch-note?



1 - Please explain this sketch note to me. What are the key insights you can derive from this?

2 - Please list 10 action items you would recommend based on the information shared in this sketch note. Number the items with **1** format bullet points and provide a brief bold intro header for each action item.

3 - I'm interested in a GenAI Policy. Is there any guidance you can give me or link me to sample policies. Alternatively, can you create a draft of a policy I could use as a starting point?

4 - The outline you provided is great. Can you provide a policy flushed out in narrative form as a starting point. I can then tweak it to fit our organization.

Create DRAFT Content - 1

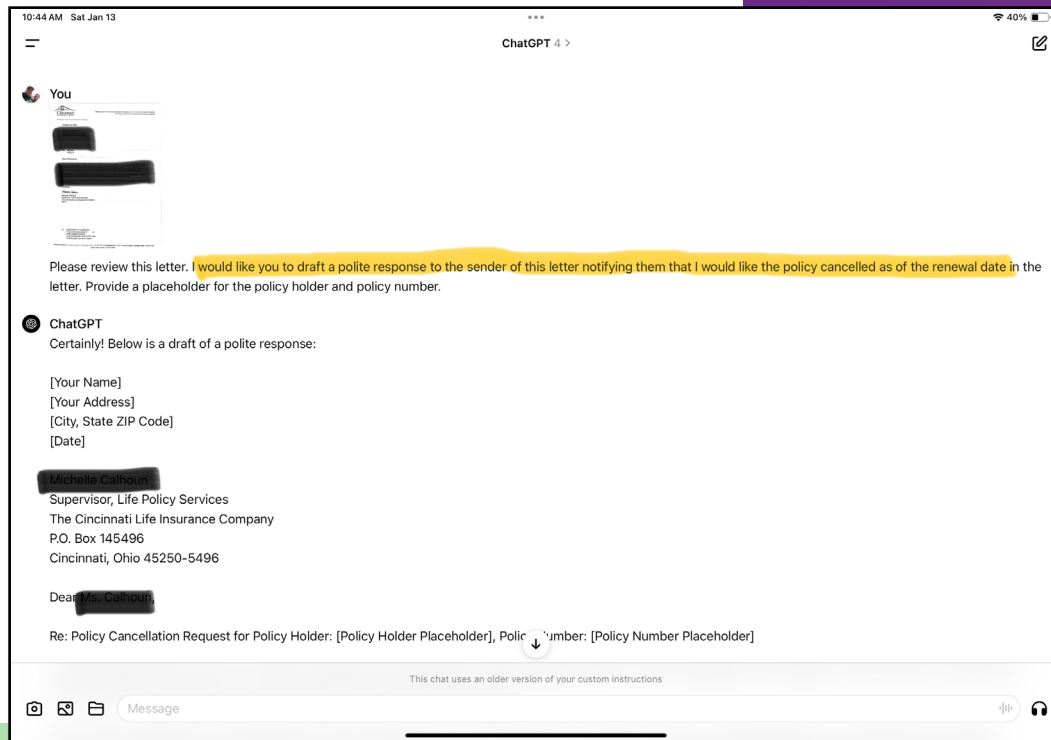
DRAFT simple letters instantly!

Draft an insurance policy cancellation letter!

Prompt:

[Upload image]

“Please review this letter. I would like you to draft a polite response to the sender of this letter notifying them that I would like the policy cancelled as of the renewal date in the letter. Provide a placeholder for the policy holder and policy number.”



Create DRAFT Content – 2 (Plug-Ins)

Scenario – This course, “GenAI for Productivity” is very popular. We want to do an outreach to CFO’s at clients to understand this offering and why they may want to offer it to their team.

Prompts:

- 1 – *“You are to act as a marketing expert. I have been asked to present to an audience on leveraging generative AI for productivity. I have a course on that and I would like you to summarize in one paragraph why a business professional would benefit from taking this course. Summarize this in 200 words and you can find the course description here - <https://learn.blionline.org/course-library/transform-your-productivity-with-chatgpt-leveraging-ai-as-your-personal-assistant/> - Take your time to get this right. Take a deep breath and let's do this!”*
- 2 – *“This is great. I would like to send an email to the CFOs at a few of my clients and would like your help drafting this. Please create a sample email to get me started.”*
- 3 – *“This is my course, so write it from that perspective. Also, the email is being sent to clients, so it should be a little less formal and more friendly in tone. Please revise. Thank you!”*

*“GenAI for productivity”
course summary
and draft email for
client reach out.*

[ChatGPT Thread Link](#)

[Return to “Use Case Categories”](#)



Human Resources Assistant - 1

Scenario – You are a Recruiting Manager for a recent IPO public company. You have just been tasked with starting a search for an Investor Relations Manager.

Prompts...Let's go!

1 - "You are to act as an expert Human Resources recruiter, with deep knowledge about Investor Relations in a public company. I have been tasked with hiring an Investor Relations Manager. Please prepare an analysis to assist me, including key qualifications, key skills and knowledge, as well as personal attributes."

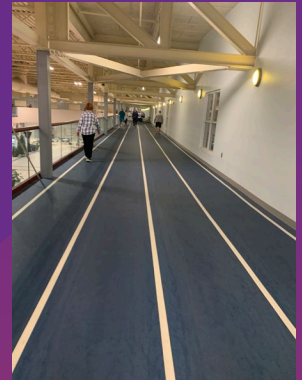
2 - "Excellent. I would like to post a job description to LinkedIn to start the search. Please create a draft of this post."

3 - "Please export the draft LinkedIn post to a Word .docx file and provide a download link."

4 - "One more request please. Please draft an email that I can send to my network. It should be a brief overview of the opportunity and qualifications. Then provide a link that the reader could use to download the full description."

This is an entirely new situation for you and the company. You have got to figure it out! Thankfully, you have Gen AI/ChatGPT!

[ChatGPT Thread Link](#)



Human Resources Assistant - 2

Scenario – Now, you need to interview candidates. With limited knowledge of investor relations, you are at a little bit of a disadvantage. Let's figure that out!

Prompt #1

"You are to act as an expert Human Resources recruiter, with deep knowledge about Investor Relations in a public company. I have been tasked with hiring an Investor Relations Manager. For an upcoming interview, I would like you to prepare 10 questions that will prompt the user to share their knowledge and expertise in the field of investor relations. Provide the question, skip a row, and provide what type of answers I might expect on the question."

Prompt #2

"add an additional three questions around stakeholders as they pertain to investor relations."

I need help preparing for my upcoming Investor Relations candidates interview.

You got this!

[ChatGPT Thread Link](#)

[Return to "Use Case Categories"](#)



Human Resources Assistant - 3

Scenario – Create a job description for a Senior Accountant position you are trying to recruit for your firm.

Starting Prompt:

“You are to act as a Human Resources consultant. I need help drafting a job description for a Senior Accountant position at a public accounting firm. This person will work in the Audit (or Assurance Services) department. They should be a CPA. Before you proceed with drafting a job description, prompt me for the information you need before you begin. Prompt me one question at a time and let me respond. Once you have everything you need, confirm you are ready to develop the job description. I will then give you the go ahead and you can start. Please take your time and take a deep breath before responding. Do you understand these instructions?”

Draft a job description for a Senior Accountant position.

In this case, we are going to converse with ChatGPT to educate it on what we need. It will prompt us as needed to get the information.

[PRIVATE Thread Link](#)

[Return to “Use Case Categories”](#)



Human Resources Assistant - 4

Scenario – You have been assigned the responsibility to create basic quizzes to be used to test candidate skills. These are to be used in the final round of interviews when filling positions.

Prompt:

You are to act as a Microsoft Excel expert. I want you to create a quiz on an excel topic I provide.

I want the quiz to be a 10 question, multiple choice, quiz. After generating the quiz, I want you to provide the answer key. The answer key should ALWAYS follow the following format:

Answer Key for Quiz Questions (BOLD Font)

1. A. SUM

- *By default, Excel applies the SUM function to numeric fields added to the Values area.*

Continue...

If you understand, prompt me for the quiz topic.

In this example, we need an Excel proficiency quiz on a specific topic.

The hiring manager wants to make sure candidates are equipped with skills around pivot tables in Excel.

[ChatGPT Thread Link](#)

[Return to “Use Case Categories”](#)



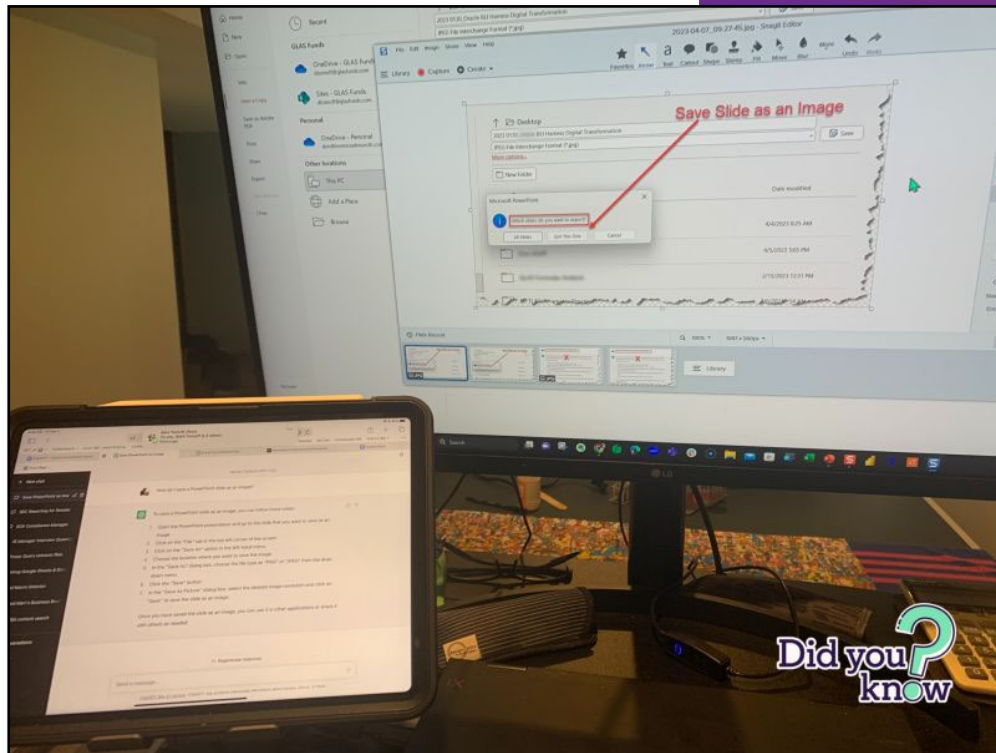
Research Assistant - 1

Super simple search
– no Google, just the
answer!

[#twinztalk Tip #1015](#) -
#chatgpt as my basic research
assistant.

Prompt:

*“How do I save a PowerPoint
slide as an image?”*



Research Assistant - 2

Scenario – One of my favorite books is “Tipping Point” by Malcolm Gladwell. What I am interested in is an analysis of the impact of Generative AI from the perspective discussed in the book.

Prompts:

1 – *“You are to act as a futurist and historical book researcher. Tipping Point by Malcolm Gladwell is one of my favorite books. Can you analyze the impact that Gen AI is having in the context of the ideas shared in Tipping Point?”*

Investigate the concepts explained in the book “Tipping Point” to today’s impact and state of Generative AI.

[ChatGPT Thread Link](#)



Create Complex Formulas - 1

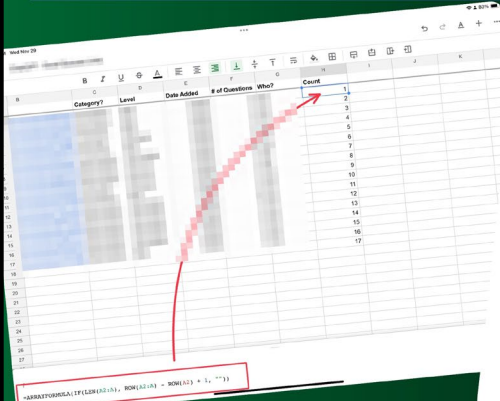
[#twinztalk Tip #1150](#) - The most under appreciated aspect of Gen AI (imo)...the SPEED at which things happen.

Prompt:

"You are to act as a Google sheets expert. Please create a formula that provides a row counter. It should be dynamic so that it increments as new rows of data are added."

Excel vs Google Sheets? ChatGPT doesn't care!

Google Sheets - Formula to Create A Dynamic Row Counter



ChatGPT

Certainly! If you require a more dynamic approach where the row counter adjusts automatically as you add or remove data, you can use a combination of the **'ARRAYFORMULA'**, **'IF'**, and **'ROW'** functions. This approach will fill down the counter automatically without the need to drag the formula.

Here's the formula you can use:

```
=ARRAYFORMULA(IF(LEN(A2:A), ROW(A2:A) - ROW(A2) + 1, ""))
```


Place this formula in the cell where you want your counter to start (for example, B2 if you want to count the rows based on data in column A starting from A2).

Explanation:

- 'ARRAYFORMULA'**: Enables the display of values returned from an array formula into multiple rows and/or columns and the use of non-array functions with arrays.
- 'IF(LEN(A2:A), ...)'**: This part checks if there is any content in each cell of column A. The **'LEN'** function returns the length of the text. If a cell is empty, its length is 0, and the counter will not increment for that row.
- 'ROW(A2:A) - ROW(A2) + 1'**: This calculates the row number for each cell in the array. It subtracts the row number of the first cell in the data range from the current row number to get a sequential count.

This formula will automatically extend the counter down as you add new rows of data in column A. The counter will only increment for rows where column A has data. If column A is empty for a row, the counter cell for that row will remain blank.

Remember to adjust the cell references (**'A2:A'** and **'A2'** in the example) to where your data starts and which column you are using to determine the count.



Create Complex Formulas - 2

[LinkedIn Tip #1151](#) - [#chatgpt](#) as a personal assistant? Just solve your everyday, time consuming, tasks or challenges.

Prompt:

"I would now like to create a filtered list from the list contained on the sheet QuizList and data located at A2:H. This filtered results should use the values in F1 and G1 to drive the filter. Do you understand?"

Creating a complex FILTER function formula for Google Sheets!

Google Sheets - FILTER Formula using Data Validation Dropdowns

1 You: I would now like to create a filtered list from the list contained on the sheet QuizList and data located at A2:H. This filtered results should use the values in F1 and G1 to drive the filter. Do you understand?

2 You: Can you please modify to handle empty criteria. If a choice is empty, I want it to return all of the items related to that choice.

ChatGPT: To accommodate empty criteria in F1 or G1 and still return all items related to the non-empty choice, you would modify the formula to check if each cell in F1 or G1 is empty. If a cell is empty, the corresponding condition should always evaluate to true; otherwise, it should match the value in the respective column.

Here's the modified formula:

```
=FILTER('QuizList'!A2:H, (IF(F1="", TRUE, 'QuizList'!F2:F = F1)) * (IF(G1="", TRUE, 'QuizList'!G2:G = G1)))
```

This formula does the following:

Quiz Topic	ChatGPT Link	Category?	Level	Data Added	# of Questions	What?
Quiz Topic	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Transformations	https://chat.openai.com/	Data Analytics	Advanced			
Power Query Basics	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Functions	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Tables	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Charts	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Validation	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Streams & Times	https://chat.openai.com/	Data Analytics	Advanced			
Power Query Tables	https://chat.openai.com/	Data Analytics	Advanced			
Power Query Query Editor	https://chat.openai.com/	Data Analytics	Intermediate			
Power Query Add-ins	https://chat.openai.com/	Data Analytics	Advanced			
Power Query Exploratory Data Analysis	https://chat.openai.com/	Data Analytics	Advanced			
Power Query Data Manager	https://chat.openai.com/	Data Analytics	Advanced			
Power Query Data	https://chat.openai.com/	Data Analytics	Advanced			

Create Complex Formulas - 3

[YouTube video demonstration](#) –
Creating a Dynamic Report
Header formula.

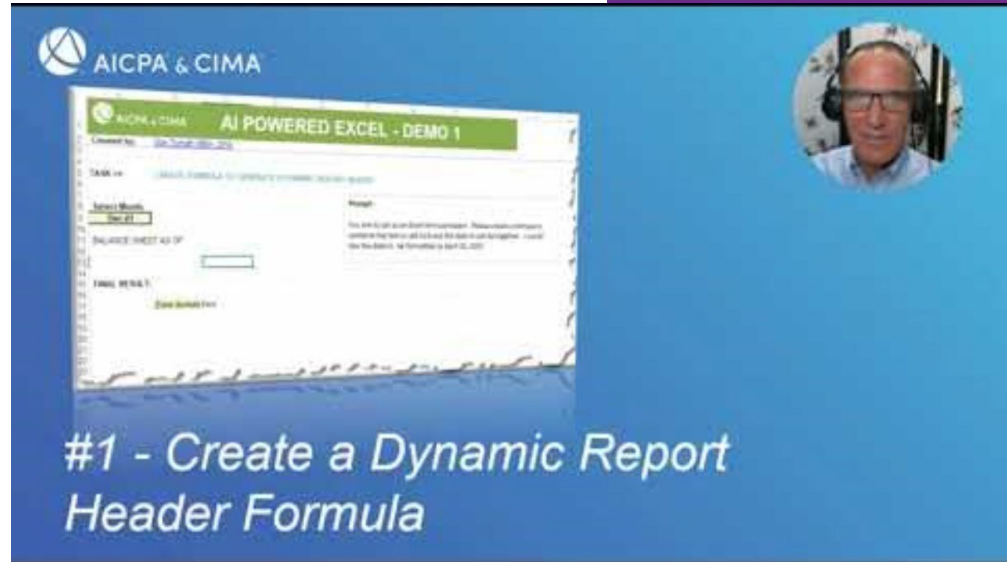
Prompt:

*“You are to act as an Excel
formula expert.*

*Please create a formula to
combine the text in cell A10 and
the date in cell A8 together. I
would like the date formatted as
April 30, 2023.”*

**This is an example of weak
prompting**

*Create a formula
to generate a
dynamically
updating report
header*



Create Complex Formulas - 4

[YouTube video demonstration](#) –

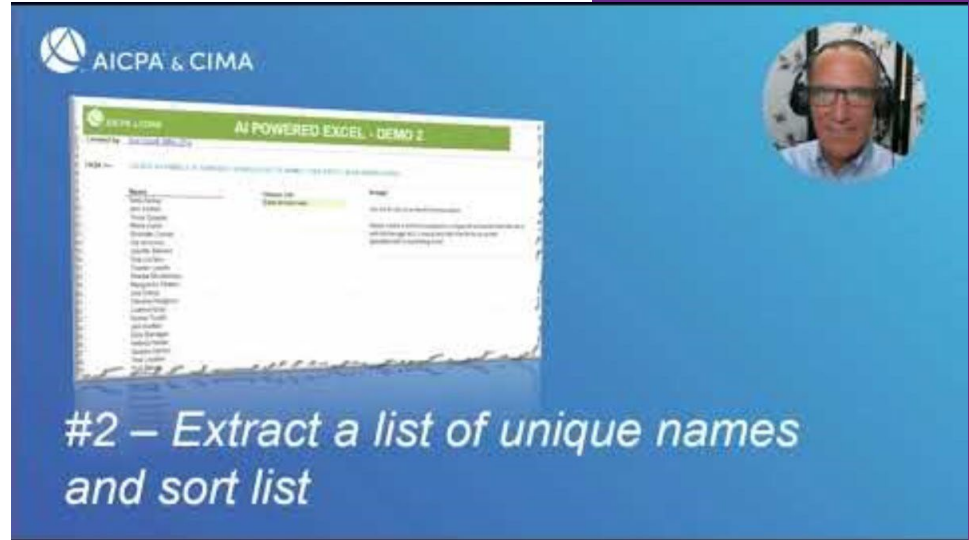
Extract a unique list of names and then sort it.

Prompt:

“You are to act as an Excel formula expert.

Please create a formula to extract a unique list of names from the list in cells B9 through B52. I would also like the list to be sorted alphabetically in ascending order.”

Create an Excel formula to extract a list of unique names and sort list.



The screenshot shows a video player interface. At the top left is the AICPA & CIMA logo. The video title is 'AI POWERED EXCEL - DEMO 2'. The main content is a screenshot of an Excel spreadsheet with a list of names in column B. A video inset in the top right corner shows a man wearing a headset. Below the video, the text '#2 – Extract a list of unique names and sort list' is displayed.

Imagine (and Create) the Possibilities – 1 (ADA)

[#twinztalk Tip #1157](#) - Idea to Done...in 30 Minutes using ChatGPT!

“Can I create a dynamically updating Windows Directory Folder list in Excel?”

Prompt:

“You are to act as an Excel power query expert. I would like you to create m-code that will provide me with a list of folders and any sub folders in a windows folder path that I provide. I want the generated list to include Date, Folder Name and the Full Folder Path.

This code should reference a separate query named FolderPathInput (this provides the folder path to analyze. I want a list of all folders and sub folders in column 1, with a count of files in that folder. Can this be done?”

ChatGPT - Idea to Done In 30 Minutes!

A high level recap, with hyperlink for quick access, to any Folder Directory I want!

Folder Name	Date	Path	Sub Folder	# of Files
...

Folder Name	Date	Path	Sub Folder	File Count	Click to Expand
IT_Phone (Personal/High)	12/1/2023	C:\Users\user\OneDrive\...	...	14	Click to Expand
IT_Personal Assistant	12/1/2023	C:\Users\user\OneDrive\...	...	3	Click to Expand
IT_Workflow Assistant	12/1/2023	C:\Users\user\OneDrive\...	...	7	Click to Expand
IT_Learning Development	12/1/2023	C:\Users\user\OneDrive\...	...	4	Click to Expand
IT_GPT (Quick Policy Development)	12/1/2023	C:\Users\user\OneDrive\...	...	2	Click to Expand
IT_Data Analysis	12/1/2023	C:\Users\user\OneDrive\...	...	1	Click to Expand
IT_Automation	12/1/2023	C:\Users\user\OneDrive\...	...	3	Click to Expand
2023 1201_HOLD	12/1/2023	C:\Users\user\OneDrive\...	...	0	Click to Expand
MANAGES for use	12/1/2023	C:\Users\user\OneDrive\...	...	1	Click to Expand

Imagine writing Excel power query m-code using natural language

This is the democratization of coding in action!

[Return to “Use Case Categories”](#)

Imagine (and Create) the Possibilities – 2 (ADA)

[#twinztalk Tip #1145](#) - #chatgpt to create an annual by month calendar in #Excel.

Prompt:

"You are to act as a Microsoft Excel expert. I want to create a full year 2024 calendar in the following format - days of the week across the top, Month Name in Column 1, Week No. in columns 2. In each cell I want to include the respective date (just the day number). Create a sample table of what that would look like with just the first 3 rows populated. If the format is good, I will ask for an Excel file to be created. Do you understand?"

From Prompt to Excel file with 2024 Monthly Calendar – thanks ChatGPT!

ChatGPT to Create Annual Calendar

"You are to act as a Microsoft Excel expert. I want to create a full year 2024 calendar in the following format - days of the week across the top, Month Name in Column 1, Week No. in columns 2. In each cell I want to include the respective date (just the day number). Create a sample table of what that would look like with just the first 3 rows populated. If the format is good, I will ask for an Excel file to be created. Do you understand?"

Month	Week No.	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
January	1	1	2	3	4	5	6	7
	2	8	9	10	11	12	13	14
	3	15	16	17	18	19	20	21
	4	22	23	24	25	26	27	28
	5	29	30	31				
February	5				1	2	3	4
	6	5	6	7	8	9	10	11
	7	12	13	14	15	16	17	18
	8	19	20	21	22	23	24	25
	9	26	27	28	29			
March	9				1	2	3	4
	10	4	5	6	7	8	9	10
	11	11	12	13	14	15	16	17
	12	18	19	20	21	22	23	24
	13	25	26	27	28	29	30	31
April	14	1	2	3	4	5	6	7
	15	8	9	10	11	12	13	14
	16	15	16	17	18	19	20	21
	17	22	23	24	25	26		

[Return to "Use Case Categories"](#)

Imagine...Develop a Learning Plan with ChatGPT!

Productivity in a Digital, Mobile, Gen AI world 🧐



[View all prompts >>](#)

[Return to "Use Case Categories"](#)

DONALD

You are to act as an Excel data analytics expert. Please explain why every professional that uses Excel for data analytics should have Power Query knowledge.

CHATGPT

Certainly, having knowledge of Power Query is crucial for professionals using Excel for data analytics for several reasons:

1. Data Transformation: Power Query allows you to efficiently clean, reshape, and transform data from various sources. This is essential for preparing data for analysis.
2. Data Connection: It simplifies data connections, making it easier to connect to diverse data sources like databases, web services, or files, ensuring you're working with the most up-to-date information.
3. Data Cleansing: Power Query provides tools for data cleansing and quality control, helping you identify and resolve issues like missing values, duplicates, and errors.
4. Automation: You can automate data

message



[Click here for full list of prompts used](#)

Imagine (and Create) the Possibilities – 4

Scenario – I want to be able to capture a thought on my phone, and have it captured and appended to an existing note on my iPhone. How can I do this? *Let's have a conversation...*

Brainstorm with ChatGPT

Prompts:

- 1 - "I would like your advice on dealing with the iPhone question that I have."
- 2 - "What I want to be able to do is anytime I have a thought about something that I need to do or something I need to remember, I want to be able just to speak it into my phone."
- 3 - "Actually, what I'd like to do is have my thoughts appended to an existing note"
- 4 - "How about using Apple shortcuts to set up an automation routine?" *(walks me through*

creating a shortcut to do this – using Apple Notes)

- 5 - "That is great, thank you."
- 6 - "One more question. So I have the Apple Note, and I want to set up a shortcut just to pin that note to my home screen. How do I do that?" *(again, walks me through creating an Apple shortcut to do this)*
- 7 - Fantastic. Last thing is I want to take the two shortcuts that I'm going to create on my home screen. *(ChatGPT cuts me off...)*
- 8 - I want to put them in a folder on my dock, on the iPhone dock. How do I do that? *(Perfect – done!)*

Brainstorm a process with the chatbot via conversation... in my car!

[ChatGPT Thread Link](#)

[Return to "Use Case Categories"](#)



Imagine (and Create) the Possibilities – 5 (ADA)

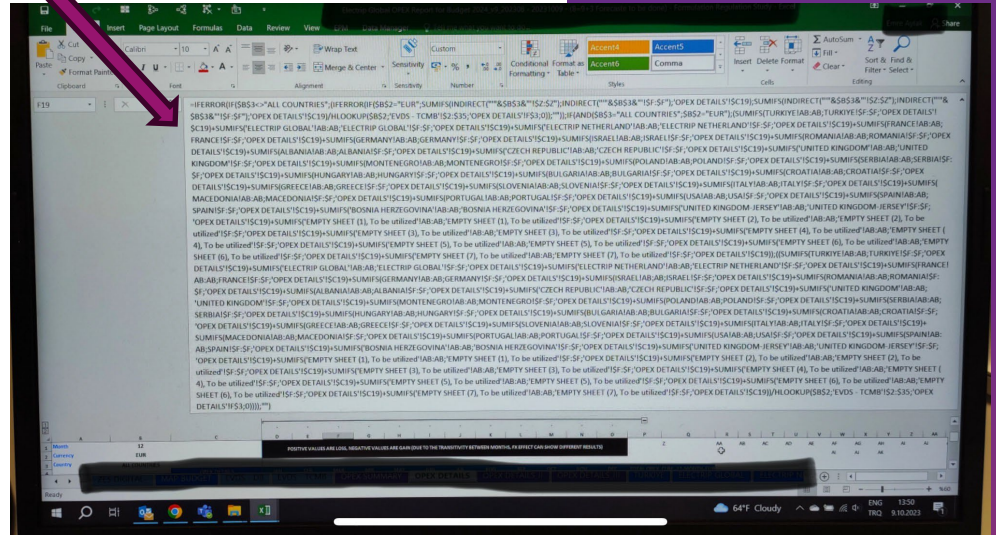
Do **SOMETHING**
with this Excel
formula –

**ARE YOU
KIDDING ME??**

Scenario – An Excel file just landed in your lap and, upon opening, the first thing you see is this chaos. (*This image was actually shared by a LinkedIn user!*)

Prompts:

- 1 – “You are to act as an Excel formula expert. Please review the formula in this image and share your insights.”
- 2 – “Please list the functions used in the formula.”
- 3 – “Please list the worksheets that are referenced in the formula.”
- 4 – “Try the worksheet list request again, using the following formula text” – [pasted in formula]
- 5 – “How many characters are in that formula?” ❌



[Return to “Use Case Categories”](#)

Imagine (and Create) the Possibilities – 6.1 (ADA)

Scenario – You are a manager in the Human Resources department and an Excel file representing budgeted payroll for the next year has been passed over to you. The head of the department is looking for some data analysis to make sense out of these details.

Step 1 – Upload the Excel file and ask ChatGPT to review the data and conduct some necessary data cleaning and transformation for you.

Once this is done, have ChatGPT create an Excel file with the properly structured data that you can use for analysis.

You've received a Payroll Budget file for the upcoming year.

Some data analysis is required to turn this into information and insight.

ChatGPT ADA for easy Data Transformation!

1 - Dimension Table

Raw Data

2 - Fact Table

Creates a two tab Excel file with proper data structure

Imagine (and Create) the Possibilities – 6.2 (ADA)

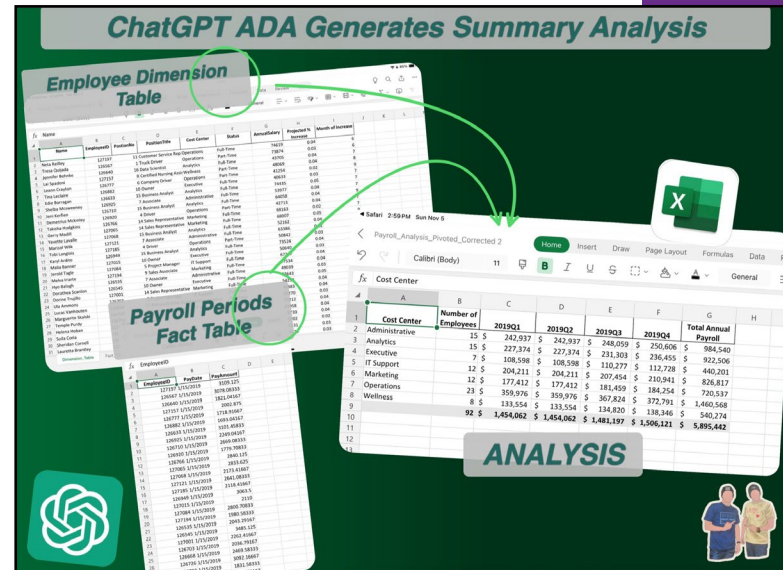
Scenario – You are a manager in the Human Resources department and an Excel file representing budgeted payroll for the next year has been passed over to you. The head of the department is looking for some data analysis to make sense out of these details. (**Part 2**)

Step 2 – Using the ChatGPT
Excel data file, we are going to load that and ask CGPT to create a basic pivot table analysis from this data. Done.

What's the big deal? We just created a clean dataset and a basic analysis without needing to build this ourselves in Excel!

You've received a Payroll Budget file for the upcoming year.

We have the cleaned data, now to create a basic pivot table analysis

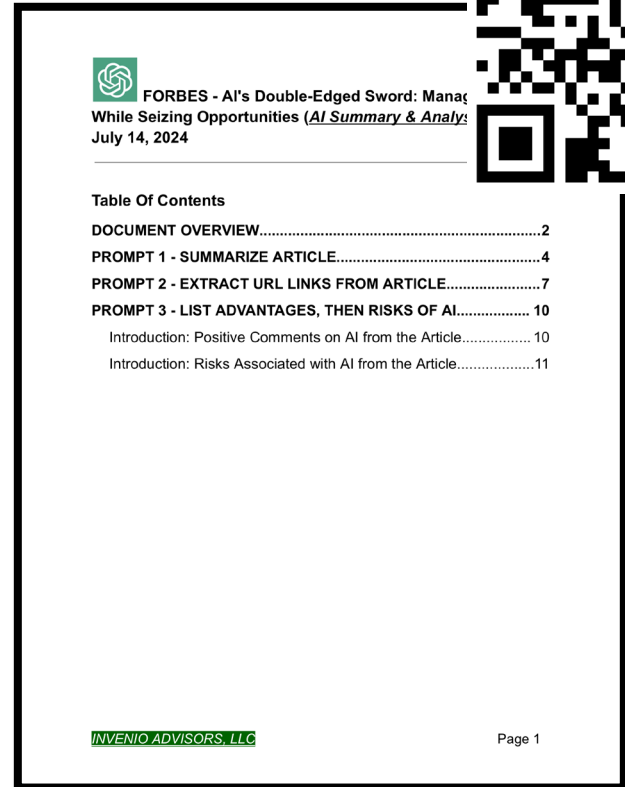


Forbes Article – 7/14/24 “AI Double Edged Sword”

In minutes, turn an insightful article into a fantastic resource for

- you,
- your team,
- your organization,
- your network, and
- Your clients!

Add value with almost no effort!



TIP #4

*Explore 5 Use
Cases – Apply
Them!*





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Wrap Up / Resources



Overheard

“I’ve never met a [redacted] professional that wants to take two hours to do something that they could achieve in two minutes or two seconds. No one wants to do things the long way. The question is what are they going to do with a lot of their new-found time.”

—Scott Belsky, Adobe’s chief strategy officer and EVP of design and emerging products, said in a Wednesday episode of the *Big Technology* podcast. According to Belsky, graphic designers are adopting recently introduced AI features in Adobe Photoshop and Illustrator that save them huge amounts of time, *Fortune* reported.

Learning Objectives

1. Recognize what Generative AI is and identify the primary GPT models. ✓
2. Use and be comfortable applying ChatGPT in a professional context, considering its limitations and ethical considerations. ✓
3. Apply ChatGPT into your daily workflow to improve productivity and automate tasks. ✓
4. Recall various Gen AI/ChatGPT practical application use cases to consider in your workplace. ✓


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

- Dr. Seuss

Recommended AI Experts to Follow

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

Influencers

Connor 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.beehiiv.com/> (subscribe and receive 50-page FREE ChatGPT Guide)
3. AI with Allie - Becoming an AI-Enhanced Human (FREE 5-day educational email course) -

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Page 1

Learning Objectives

1. Set up and be comfortable using ChatGPT in a professional context. ✓
2. Integrate ChatGPT into their daily workflow to automate tasks and improve productivity. ✓
3. Use ChatGPT effectively in team environments, integrate it into their personal knowledge management process, and troubleshoot common issues that may arise. ✓
4. Identify various Gen AI/ChatGPT use cases to apply immediately in your workplace. ✓

*“The more that
you read, the
more things
you will know.
The more that
you learn, the
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- Dr. Seuss



Questions and comments



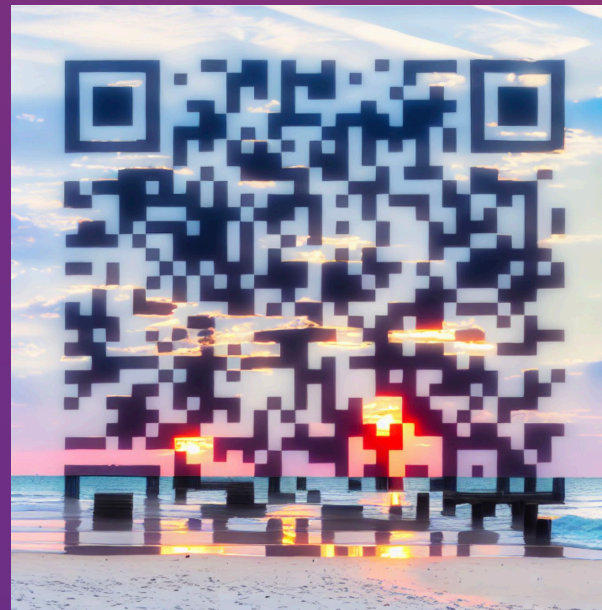
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Donald R. Tomoff, MBA, CPA
Invenio Advisors, LLC



Thank you



Don LinkedIn – Let's Connect!

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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.

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.

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.

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.

TECHNOLOGY AND COMPUTER SKILLS

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

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.

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?

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.