



A STRATEGIC APPROACH TO SELECTING YOUR AI TOOLS

FOR CPAs IN BUSINESS & INDUSTRY

Claude  Gemini 

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Learning Objectives



- Identify the range of AI apps to choose from
- Identify the key attributes to evaluate in the selection of an AI app
- Review key features of the foundation models and apps

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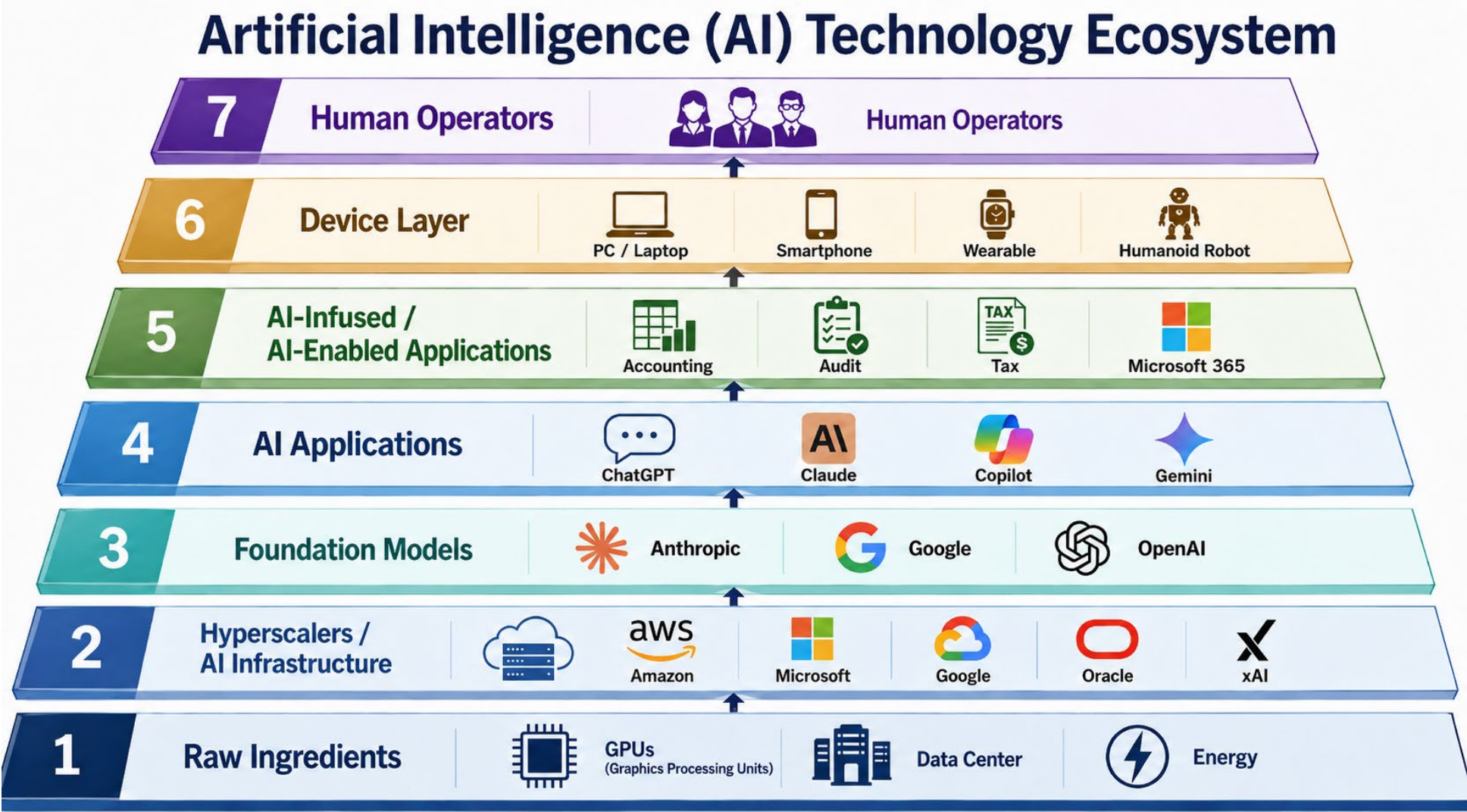
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Presentation Outline

- AI Models vs. AI Apps
- AI App Evaluation Criteria
- Claude, ChatGPT, Copilot & Gemini Feature Comparison



AI Model

The intelligence engine



AI App

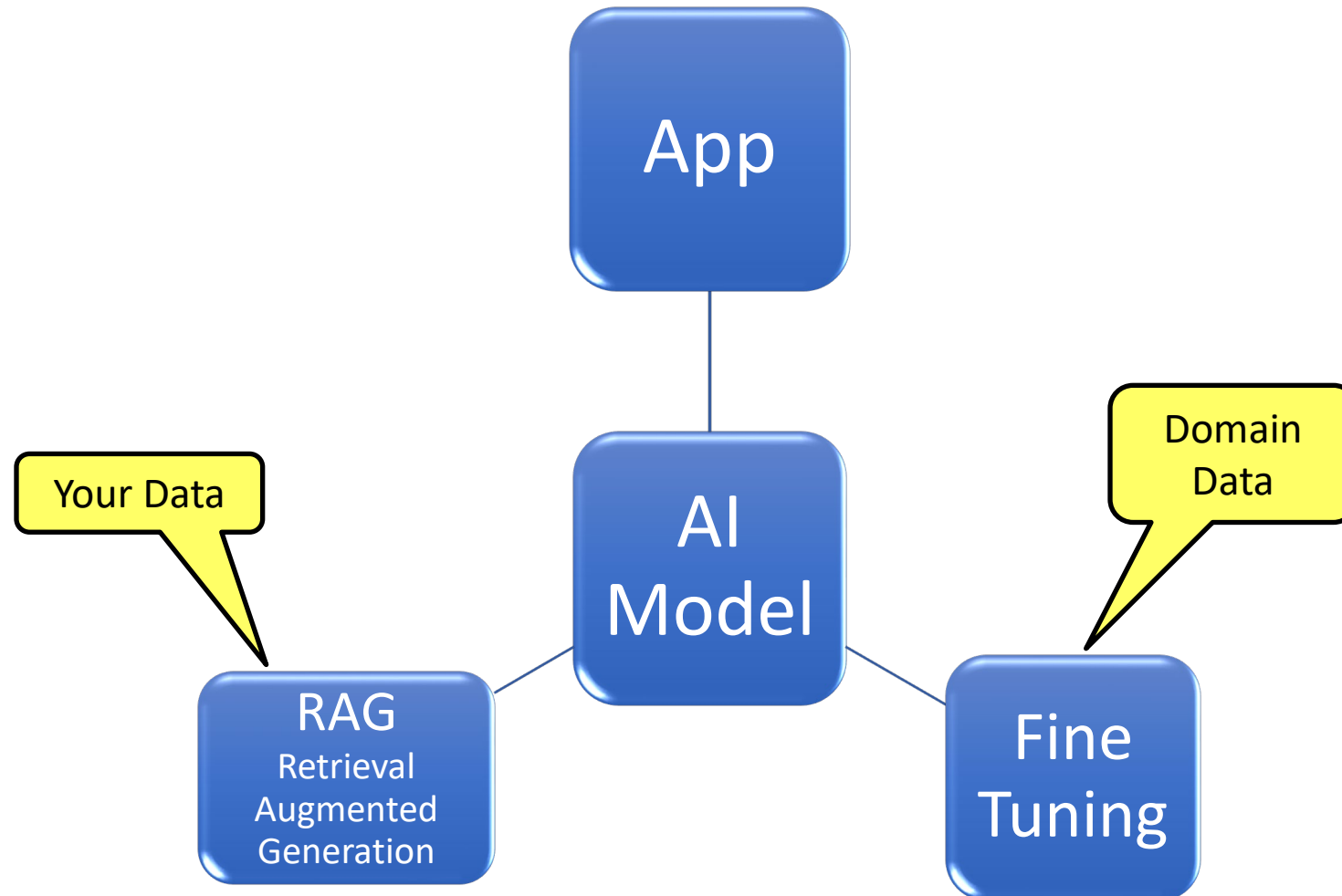
The complete user experience



An AI model provides the **core intelligence**. An AI app packages that intelligence into a **usable product** with interface, tools, integrations, and workflows.



THE AI MODEL & APP RELATIONSHIP

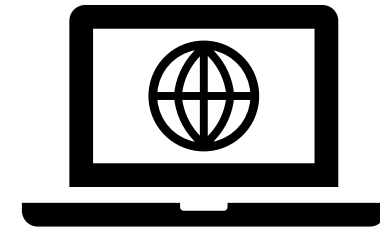


Key Features of AI “Models”

- ✓ ***Intelligence*** - How smart is it?
- ✓ **Data** – What information does it draw from?
- ✓ ***Reliability*** - Can I trust its output?
- ✓ ***Capacity*** - How much and what types of information can it process?
- ✓ ***Performance*** - How fast and economical is it?
- ✓ ***Agentic Capability*** - What can it do?

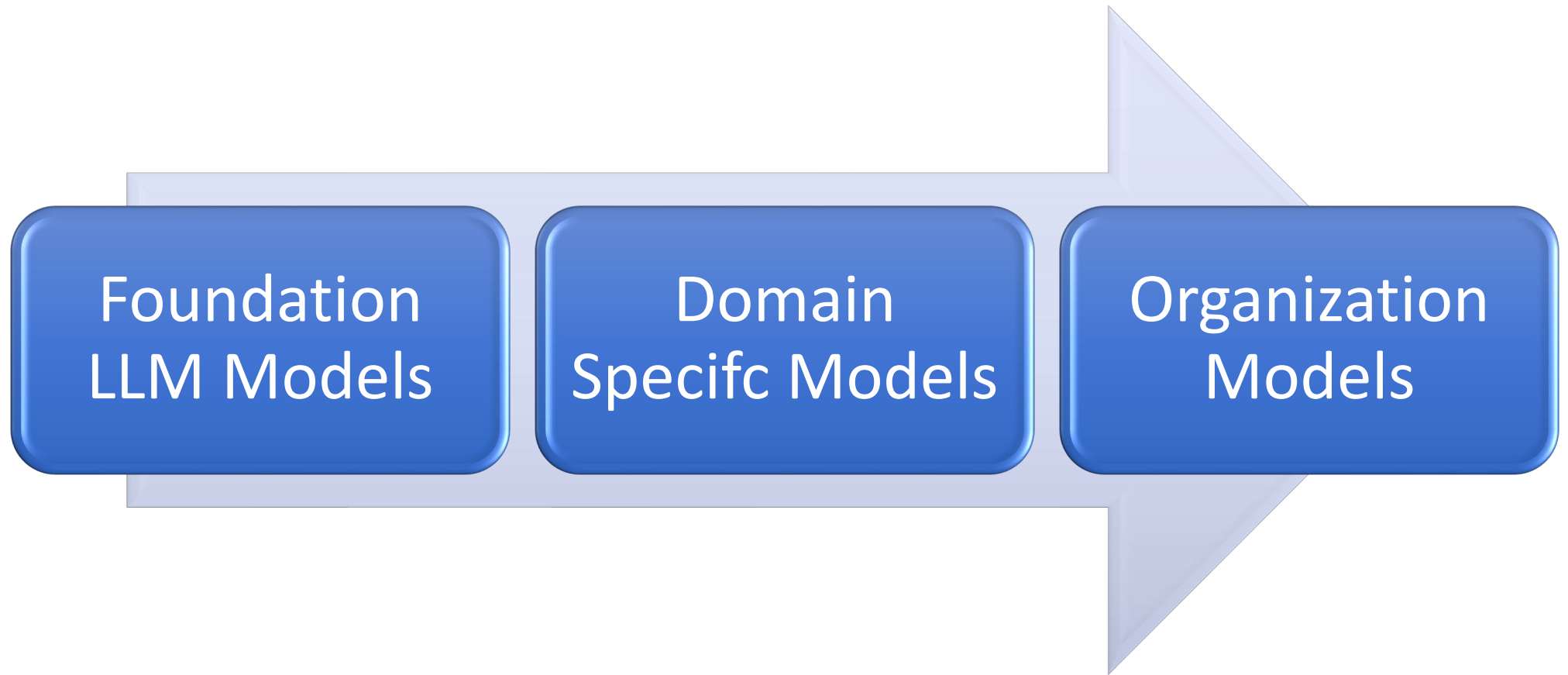
Current AI Model Leaders

- Claude Fable 5 (Anthropic)
- GPT 5.6 Sol (OpenAI)
- Kimi K3 (Moonshot AI) – Open Weight
- Gemini 3.1 Pro (Google)
- Grok 4.5 (SpaceX/xAI)



LiveBench AI Model Benchmark

Evolution of AI Models



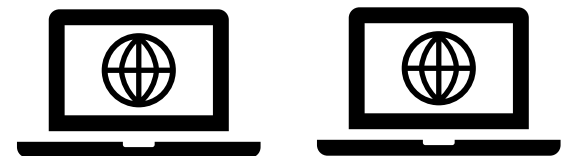
Key Features of AI “Apps”

- ✓ User interface
- ✓ Feature set
- ✓ Data security and governance
- ✓ Data access & integration
- ✓ Agentic AI features
- ✓ Cost (including token usage fees)



Anthropic Claude Features

- Claude Cowork – Natural language agent builder for “end users”
- Model leader (slight) in technical benchmarks
- Focus on enterprise applications
- Strong agentic AI capabilities
- Strength in building artifacts, e.g., apps, websites and diagrams





Google Gemini Features

- Direct integration / grounding in Google apps
- Integration with Google search ecosystem
- Gemini Gems – custom built reusable prompts
- Google Notebooks for dedicated project workspace and output deliverables
- New Spark agent builder



Sample Gem



Sample
Notebook



Microsoft Copilot Features

- Direct integration / grounding in Microsoft 365 apps and data
- Integration of Anthropic and ChatGPT models
- Microsoft Enterprise Data Protection policy
- Copilot Cowork natural language agent builder
- Copilot Notebooks for dedicated workspace

OpenAI ChatGPT Features



- Deep research - structured and cited research
- Projects for dedicated workspace
- GPTs - Custom prebuilt and reusable prompts
- Workspace Agents - organizational agent builder (business version)
- “Apps” feature connects ChatGPT to app data

WRAP-UP



In Summary

- The technical capabilities of the leading AI apps exceed our ability to leverage them
- Pick one or two apps and focus your efforts on building deeper expertise
- Monitor your existing software providers for AI capabilities infusion
- Invest time in building your AI skills!

Questions ?



Thank you!!!

Let's connect on LinkedIn →

