



Stop Doing It By Hand: The Automation Conference for Accounting & Finance

■ CPE Today • 2027 K2 Technology Conferences

Stop Doing It By Hand: The Automation Conference for Accounting & Finance

Automation

October 20, 2027

Live online • Central Time

8 CPE

Credits, proposed

1 day

Group Internet Based

Proposed Agenda

Day One

8:00 AM – 9:40 AM

Before You Automate: Picking the Right Integration Approach

Information Technology · Intermediate · 2 CPE

What each is actually good at, pricing models that bite at scale, and how to pick without regretting it in eighteen months.

- Differentiate between the three primary categories of iPaaS providers currently serving the professional services market.
- Identify the specific pricing triggers in Zapier and Power Automate that lead to significant cost increases at scale.
- Compare the security and data residency implications of cloud-hosted versus self-hosted automation platforms.
- Apply a selection matrix to determine which platform best suits a firm's existing technical stack and internal skill sets.

Prerequisites: A basic understanding of cloud-based software and the concept of API connections. ·

Advance preparation: None

9:40 AM – 9:50 AM

Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

Ten Automation or Integrations Every Business Team Should Build First

Computer Software and Applications · Basic · 2 CPE

Most teams know they should automate more of their work but aren't sure where to start. They either stick to a few simple rules or jump into a project so complex it never gets finished. This session lays out a practical path: ten automations every business team should build, arranged from basic to advanced. It starts with simple wins built into tools you already use, moves into multi-step workflows built on...

- Identify ten automations that eliminate repetitive work common to business teams
- Describe the trigger, steps, and result that make up a working automation
- Compare integration platforms with built-in desktop tools to select the right one for a given task
- Describe how AI connectors built on the Model Context Protocol link an AI assistant to business applications

Prerequisites: None · Advance preparation: None

From Inbox to Workflow: Rebuilding Your Approval Process

Audit · Intermediate · 2 CPE

AP approvals, journal entry review, expense policy enforcement. Designing routing logic, handling exceptions, and keeping evidence for audit — using workflow tools rather than email chains.

Accounting

- Identify the specific risks and inefficiencies associated with email-based approval chains.
- Design a logical routing structure for accounts payable and journal entry reviews.
- Determine how to handle exceptions and overrides without breaking the digital audit trail.
- Evaluate the documentation requirements needed to satisfy internal and external audit standards in an automated environment.

Prerequisites: Experience managing or auditing manual approval cycles within a corporate or public accounting environment. · Advance preparation: None

11:30 AM – 12:20 PM Lunch

12:20 PM – 1:10 PM **CHOOSE ONE OF 2 SESSIONS**

Why Your AI Output Is Mediocre (And How to Fix It)

Computer Science · Intermediate · 1 CPE

Practical prompting for finance tasks — structure, context, iteration. Bite-sized, high satisfaction.

- Identify the three primary reasons why generic prompts lead to low-quality financial summaries and analysis.
- Apply a structured prompting framework to ensure AI outputs include the necessary context and constraints.
- Develop a multi-step iteration process to refine AI responses for complex accounting research or report drafting.
- Evaluate AI-generated content for common logic errors and hallucinations specific to financial data.

Prerequisites: Basic familiarity with using generative AI tools for simple text generation. · Advance preparation: Participants should have access to a large language model such as ChatGPT, Claude, or Gemini to test prompting techniques during the session.

Who Audits the Robot?

Accounting · Intermediate · 1 CPE

When the process runs itself, what are you testing? Segregation of duties across service accounts, change management on automations, and documenting a control nobody performs. Auditing

- Identify the unique risks associated with service account permissions and segregation of duties in an automated environment.
- Analyze the requirements for documenting controls that are executed entirely by software agents.
- Evaluate change management protocols to ensure automations remain compliant after updates or logic shifts.

Prerequisites: A working knowledge of basic internal control frameworks and familiarity with robotic process automation concepts. · Advance preparation: None

1:10 PM – 1:20 PM Break

1:20 PM – 2:10 PM **CHOOSE ONE OF 2 SESSIONS**

You Already Own a Workflow Platform: Microsoft 365 for CPAs

Computer Software and Applications · Intermediate · 1 CPE

Using Power Automate, Lists, Forms, Loop, Planner, and SharePoint as a finance workflow platform.

- Identify the core components of the Microsoft 365 stack that function as a unified workflow platform.
- Determine which manual accounting tasks are best suited for automation using Power Automate and Lists.
- Construct a basic data flow that connects Microsoft Forms to a SharePoint list for automated record keeping.
- Evaluate how Microsoft Loop and Planner can replace traditional email chains for internal project coordination.

Prerequisites: A basic understanding of the Microsoft 365 ecosystem and experience managing manual accounting workflows. · Advance preparation: None

Your Accounting System Can Do That

Accounting · Intermediate · 1 CPE

Underused native capabilities like recurring entries, allocation rules, workflow, and custom reports.

- Identify three common accounting tasks that can be handled through native system automation rather than manual entry.
- Configure recurring journal entry templates to manage monthly accruals and prepaid amortizations.
- Establish automated allocation rules to distribute overhead costs across multiple dimensions or departments.
- Design basic internal workflow triggers to automate the routing of approvals within the accounting software.

Prerequisites: Experience with mid-market or enterprise resource planning (ERP) software and a basic understanding of general ledger structures. · Advance preparation: Review the current list of manual journal entries and recurring monthly adjustments within the organization's primary accounting software.

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM Stop Rebuilding the Same Report Every Month

Computer Science · Intermediate · 2 CPE

Explores where the data prep ends and the model begins.

- Distinguish between one-time data cleaning tasks and repeatable data modeling steps.
- Identify the structural flaws in reporting files that require manual intervention every month.
- Apply principles of data normalization to ensure reports remain stable as new information is added.
- Recognize the signs of a fragile report and implement strategies to make the output more resilient.

Prerequisites: Experience with manual reporting workflows and basic spreadsheet data manipulation. · Advance preparation: None

All times Central Time. Proposed agenda — sessions, times and credits may change before the conference.

Registration details, final credits and NASBA disclosures are published on the conference page.

<https://www.cpetoday.com/conferences/2027/stop-doing-it-by-hand>