

CPE Today · 2027 K2 Technology Conferences

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

Automation

October 20, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

Many accounting and finance teams know they should automate more but are unsure where to start, so they either stick to a few simple rules or take on projects too large to finish. This conference lays out a practical path. It opens with how to pick the right integration approach, including what each option is good at and the pricing models that bite at scale. It closes with how to stop rebuilding the same report every month by separating data preparation from the model.

In the Productivity track, you will work through ten automations every business team should build first, arranged from basic to advanced, use Microsoft 365 tools such as Power Automate, Lists, Forms, Planner, and SharePoint as a workflow platform, and apply structure, context, and iteration to get better AI output for finance tasks. In the Industry & Firm track, you will rebuild AP approvals, journal entry review, and expense policy enforcement as workflows that keep evidence for audit, put underused features of your accounting system to work, and learn what to test when a process runs itself. You will earn credits in Information Technology, Computer Software and Applications, Accounting, and Auditing.

Who Should Attend

- Accounting and finance teams that still move data and approvals by hand or by email.
- Controllers and firm administrators choosing an automation or integration approach.
- Staff who rebuild the same monthly reports and reconciliations each period.
- CPAs in firms and industry who want 8 CPE credits in technology, software, accounting, and auditing.

What You'll Take Away

- Compare integration approaches and their pricing models before committing to one.
- Prioritize the first ten automations for your team, from basic to advanced.
- Replace email approval chains with routed workflows that handle exceptions and keep an audit trail.
- Use Power Automate, Lists, Forms, and SharePoint as a finance workflow platform you already own.
- Configure recurring entries, allocation rules, and workflow features already in your accounting system.
- Build repeatable reports that separate data preparation from the presentation layer.

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 Software and Applications · 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.
- Determine who is accountable for transactions processed by an automated workflow.

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 Software and Applications · 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.
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