

GETTING STARTED AND PROMPTING

Where to start with AI

Most accountants I speak to have tried AI and stopped at the chat box. The research says what helps: short, practical work on real tasks. Here is what that looked like in my own work.

56% name generative AI their biggest skills gap	88% expect AI to be the most transformative trend	8% say their organisation is very well prepared for it	17% of firms not yet using AI do not know where to start
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AICPA & CIMA Future-Ready Finance survey, 1,446 senior finance and accounting leaders, December 2025. Financial Cents, State of AI in Accounting and Bookkeeping 2026, 486 respondents.

"Low AI literacy is now the most significant barrier finance leaders must address."

MARCO STEECKER, GARTNER

Gartner's advice: "project assignments, sandbox experimentation and short, on-the-job activities."

"I wish I had more time for evaluation and that there was a resource on how to implement AI in specific scenarios."

A FIRM OWNER, FINANCIAL CENTS SURVEY

Understand what it is

An AI model writes what sounds right, and it can sound just as sure when it is wrong. I gave three Claude models the same accounting questions and checked every answer.

Add up 30 amounts to the cent, with no calculator. Haiku 4.5 was **R1.00 out**. Sonnet 5.5 and Opus 5.5 were right to the cent.

List every action in a SARS letter, each deadline as a date. Haiku had **one deadline a day out**. Sonnet and Opus got both, and Opus warned about fake SARS letters.

Explain the IFRS 16 short-term lease exemption. Haiku was **wrong, while rating itself highly confident**. Sonnet and Opus were right.

One answer per model, no web search or tools: a snapshot. Let Excel do the arithmetic.

Ask well

ASKED PLAINLY

"Summarise this SARS letter."

What came back: a summary that called the letter routine, with the branch visit left as "within 21 business days".

ASKED WELL

"I am an accountant in South Africa. Below is a SARS letter to my client. List every action the client must take and its deadline as a calendar date. Count business days without weekends and public holidays, and show the count. Quote the line each action comes from. If anything is unclear, say so. Use a table: action, deadline, quoted line."

What came back: every action in a table with its quoted line, the count shown, two points flagged.

Both asked of Claude Haiku 4.5 with the same letter, one answer each.

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Keep what works, start small

When a prompt gives you the answer you want, keep it. Then pick one real task and practise it on made-up data before it touches client work.

Write it once, use it every time

Instructions for every chat

Mine say: never make an assumption and tell me what you think I want to hear. Never hardcode values in Excel, use formulas always, and flag any exception with the reason. Written once, they apply to every chat and every Cowork task.

A skill for a monthly job

My month-end dashboard skill takes the monthly export, maps it into a checked template and builds the dashboard. The commentary comes last, once the figures are settled. When I planted 11 faults, it caught all 11.

A project per client

Save the prompt that worked in a project with its instructions and files. The next month, or the next client, starts from your best version instead of a blank chat.

Start with one task

An accountant asked me for one thing: her emails turned into a to-do list she can tick off. That became one scheduled task in Claude, writing one row per action into an Excel workbook.

New emails arrive



Claude reads them



A row per action in Excel



You tick Done



Next morning, only what is open

I tested it on five made-up emails before any real ones. The first run gave six rows, with the SARS letter split into two actions and the business days counted. I ticked one item, and the second run moved it to Done.

What you need: your email (Gmail, or Outlook on a Microsoft 365 work account), a paid Claude plan, because the morning run is a scheduled task, and Excel.

How I would start

Pick one job you do every week that has a clear right answer.

Practise on made-up clients until every row is right.

Keep the prompt and the checks, then move to the next job.

✱ **The line I start most jobs with**

"Before you build, ask me 5 clarifying questions. Then build it."

Claude asks before it guesses, and the first draft starts from my answers instead of its assumptions.

Everything here is set out step by step in a free 30-minute introduction for accountants at kantonwest.com/courses.

AICPA & CIMA Future-Ready Finance survey, December 2025. Gartner, 160 senior finance leaders, September 2026. Financial Cents, State of AI in Accounting and Bookkeeping 2026. The clients in the examples are made up.