



# The Overworked Accountant's Guide to AI

Practical Tools to Do More with Less

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John has 12+ years of experience in public and corporate accounting, specializing in month-end close and day-to-day operations. He helps finance teams transform manual processes and automate workflows using AI, bringing work in-house and lowering the cost of delivery.



**David Lam**

**CEO, Abacor**

David has close to 15 years of accounting experience, from PwC, Deloitte, and Crowe to building software for accountants at Gusto. David sits at the rare intersection of deep industry expertise and emerging technology.



**Danielle Lewis**

**Principal, Zeroed-In Consulting**

Danielle Lewis is a Nevada-licensed CPA with over a decade of expertise in complex public and private accounting, specializing in US GAAP, SEC/regulatory reporting, and process optimization.



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## Before We Start

### Housekeeping

- Drop questions in chat anytime. We will surface them at the end.
- We're recording. Link goes out tomorrow to all registrants.
- Slides + resource links posted in chat at the close.
- Live demos incoming! What could possibly go wrong?!

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## Accountants Are Drowning

The reality of the modern close cycle



### Real story

A ~\$1B client. 25-person accounting team. They cannot get under 60 hours per week, no matter what they try.

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# Hiring More People Isn't the Answer

AI changes the model. Not just the speed.

## Today

### Doing the work

- You code every invoice
- You run every recon
- You write every memo
- More volume = more hours



## Tomorrow

### Orchestrating it

- AI runs the coding rules
- Agents do the recons
- You review, decide, approve
- More volume ≠ more hours

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THE FRAMEWORK

# Four layers, built in order.

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## The Four Layers

- 1 **Capture** everything  
*AI notetaker. Your baseline.*
- 2 **Remember** everything  
*Persistent knowledge base*
- 3 **Repeat** everything  
*Skills & Plugins*
- 4 **Delegate** everything  
*Agents*



### The Order Matters

If you skip Layer 1, the rest doesn't work. Capture is what feeds everything below it.

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LAYER 1

# Capture Everything

The AI notetaker is the fuel to your data layer.

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# Why the Notetaker Is Non-Negotiable

It's the data layer everything else feeds on

- **Pre-meeting prep**  
No more scrambling for information before your call
- **Auto-generated notes**  
Eliminate scribbling while trying to listen
- **Action items**  
Captured in the moment, assigned automatically
- **Post-meeting workflow automations**  
Automate everything after a meeting from recap emails to generating artifacts to updating systems and CRMs

LIVE DEMO

## Abacor in action

Preview of various meeting workflow automations from before and after meetings.

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LAYER 2

# Remember Everything

The persistent knowledge base is where everything compounds.

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## Why the Knowledge Base Matters

Persistent memory turns one-off answers into compounding leverage

### Firm-wide memory

Every meeting, memo, and SOP, searchable in one place.

### Consistent answers

Same question, same answer, no matter who asks.

### Onboarding boost

New hires ramp on your firm's history, not generic training.

### Context for tools

Skills and agents pull from the same source of truth.

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LAYER 3

## Repeat Everything

Skills & Plugins turn your SOPs into something AI runs for you.

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## What's a Skill?

A skill is your company's SOP, packaged so AI runs it the same way every time.



### Repeatable

The same SOP runs the same way, every time. No prompt drift.

*monthly close checklist*



### Combinable

Skills can call other skills. Build once, reuse everywhere.

*journal entry → review → post*



### Maintainable

Change the skill, the change applies firm-wide.

*update one skill, every future run updates*

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## How to Build a Skill

Three steps from messy workflow to reusable AI SOP.



### Capture

Work with AI to complete the workflow you already do.



### Draft

Once you've finished the task, just type "Turn This Into a Skill".



### Refine

Run it on a real task (or the same one to test). Work with AI on what broke. Tighten the instructions. Repeat.

**THE TAKEAWAY** Write the SOP once. The skill runs it forever, the every time.

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LAYER 4

# Delegate Everything

The Agentic Close is where you go from running workflows to delegating them entirely.

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## How the Agentic Close Works



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## The ROI Use Case

Same \$1B client, same 25-person team, back under 60 hours and into advisory work.

# 60% dec.

**time to close, recs, and review prep due to automation**

Their close used to swallow the team. Agents now own the task list, pull the data, and run the recs, **staff review and sign off.**

**4x**

Faster first-pass on memos, narratives, and emails

**↓ Errors**

AI catches what tired eyes miss at 11 PM

**↓ Burnout**

Same team handles more work without burning out

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## Risks to Manage

Adopting AI without guardrails creates new exposures.

**1**

### Hallucinated Output

Confident-sounding answers that are wrong. Risk to financials, memos, and reviewed work product.

**2**

### Data & Privacy

Client data leaking into public models. Confidentiality and SOC 2 implications.

**3**

### Weak Controls

AI in workflows without review, audit trail, or segregation of duties.

**4**

### Skill Atrophy

Junior staff stop learning the fundamentals if AI does the first pass.

#### MITIGATION

Use enterprise AI tools with data controls. Keep human review on every output. Treat AI as a junior preparer, never the signer.

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## Skills ZI Uses Every Week

SOPs we've packaged so the team stops redoing the same setup work.

### Memo Anonymizer

Strips client names from memos and applies ZI brand.

### Meeting Task Extractor

Pulls action items from meeting transcripts into ClickUp.

### Branding

Single source of truth for ZI colors, fonts, and logos.

### CC Reconcile

Matches card statements against the GL, flags exceptions.

### Time Booking

Books Everhour time straight from Outlook calendar.

### Pricing Generator

Builds scoped pricing proposals from a quick brief.

### Inbox Recap

Summarizes the inbox and surfaces what needs a reply.

### GL Analyzer

Scans the full GL for stuck balances and aged items.

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## What You Can Do This Week

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### Document your close process

Every task, every checklist. If it lives only in someone's head, AI can't help with it yet.

2

### Build your knowledge base

Run the notetaker on every meeting. Feed past closes, memos, and SOPs in. Layer 1 and 2 starts now.

3

### Turn each task into a skill

Start with the most painful, most repetitive one. Prove the pattern, then scale it.

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## Recap



### Two ways to take action this week

#### Book a Demo with Abacor

Get the notetaker running on your next meeting. All attendees who schedule a demo on abacor.com will receive a special 20% discount for the first year.

#### Book a Discovery Call

Bring your close process. We'll help you operationalize your knowledge base, skills, and agents.



# Q & A

Drop your questions in the chat