

The AI Opportunity

Unlocking the full potential in a
Generative AI World



"The best way to predict the future is to create it."

– Peter Drucker

Presenter



Beau Bridges
Director of AI Solutions
New York City, NY

- Based in **Manhattan**, NYC & serves as the Director of Innovation Operations of **EDGE**, the Innovation Lab at Forvis Mazars.
- More than 20 years' experience working in technology businesses, 16 of those working in & around innovation.
- The core objectives of his role are to increase the impact of innovation throughout the business, leading to increasingly valuable solutions for the business internally & externally.
- Most recently he has been focused on **Mixed Reality & Generative AI** programs, helping the business to understand the value of these emerging technologies. Beau also leads the cross-functional teams providing research, events, communication, development and an area for platform experimentation.
- Before joining EDGE, Beau worked in Mazars UK & US as well as businesses including T-Mobile, BlackBerry, & started his career in the Royal Navy.
- He has an MBA from University of Gloucestershire, as well as being a Fellow of the Chartered Management Institute, holds Level 7 Diplomas in Strategic Leadership & Management, as well as attaining the ITIL Expert qualification for Service Management
- Outside of work he loves to spend his time on the water doing anything from **kitesurfing & sailing to paddleboarding**.

There are two quotes that I love:

- ***The best way to predict the future is to create it.***
– Peter Drucker
- ***Life is 10% what happens & 90% how you react.***
– Charles R. Swindoll

Agenda

- The AI impact
- AI Overview
- Risks & Mitigation
- How to Prompt
- Models & Modality
- Use Cases
- The Future Now
- Best Practice
- What to Do Next



Learning Objectives

- Understand the Impact of AI
- Explore AI Technology
- Evaluate Risks in AI
- Some Mitigation Approaches
- Different AI Systems
- Look at Use Cases
- Best Practices
- Ideas for the Future

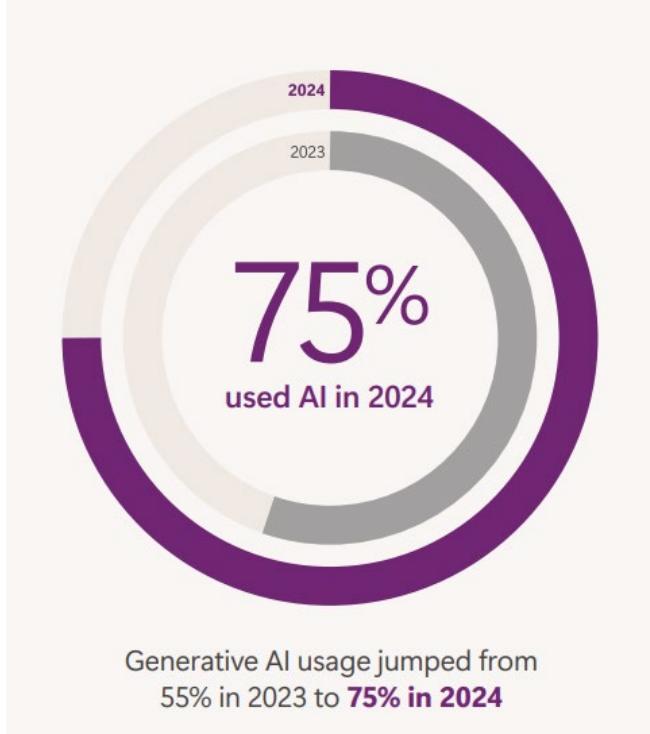


The AI Impact





The year is 2024 ...



Source: Microsoft Work Trend Index 2024



80%

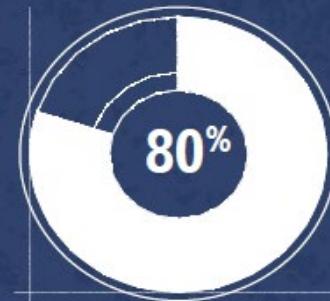
Of workforce say they are too busy to do their current work

53%

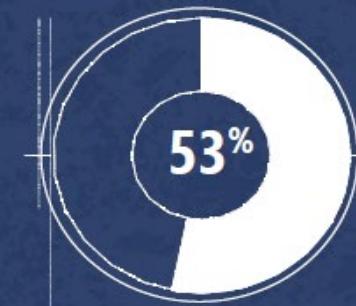
Of Leaders say productivity needs to increase

82%

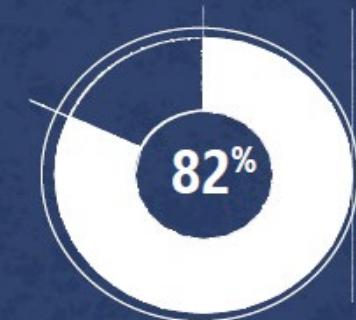
Of Leaders expect to use Agents to meet productivity demands



of the global workforce—
employees and leaders—say
they lack enough time or
energy to do their work



of leaders say productivity
needs to increase



of leaders expect to use
agents to meet the demand
for more workforce capacity

Intelligence on tap fills the capacity gap

Both leaders and employees are maxed out, but business demands continue to rise. Many see agents as the way forward.

Survey questions:

In the last year, to what extent do you agree or disagree that you have struggled with the following at work? (share of respondents who said they agree)

To what extent are your employees' productivity levels meeting the needs of the business? (share of respondents who said employees must at least moderately increase their productivity)

Now, let's explore how AI agents will impact your workforce and business processes in the next 12–18 months. To what extent are you confident your organization will leverage agents to expand workforce capacity with AI agents acting as digital team members? (share of respondents who selected at least medium confidence)



Comfortable with agents



Constant AI Usage



Trust AI for high stakes work



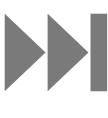
Ability to manage agents



Use AI as a thought partner



See AI as a knowledge accelerator



Saving +1 hour daily using AI

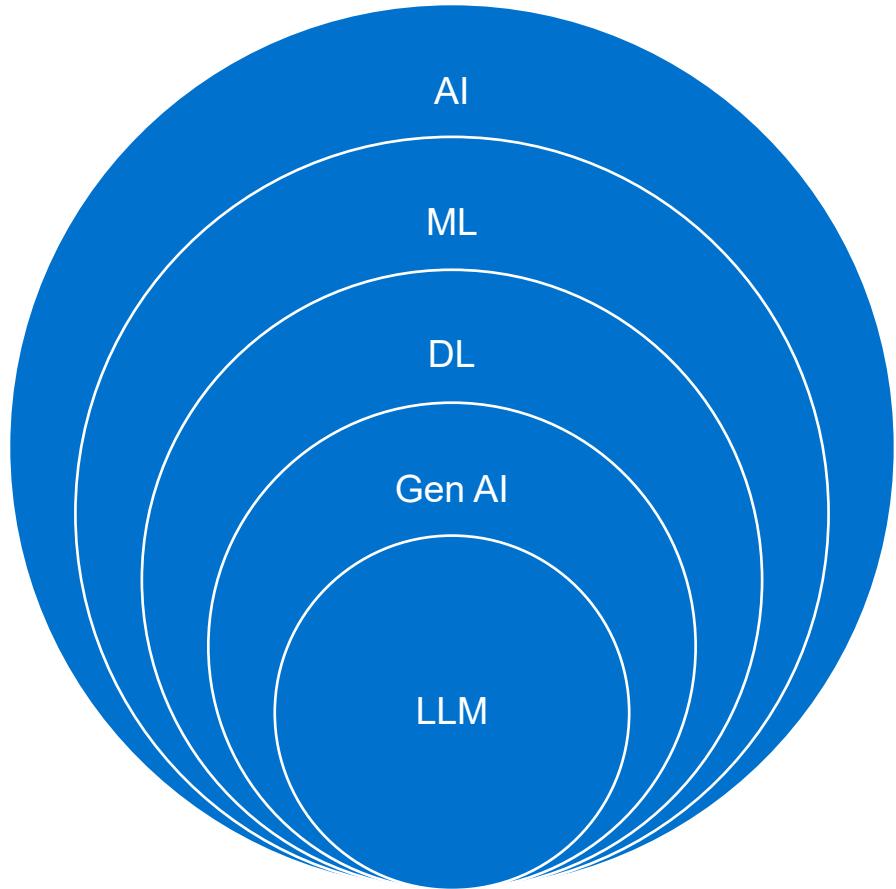
Source: Microsoft Work Trend Index 2025



AI Overview



AI Overview – Demystifying the Tech



Artificial Intelligence – computer ability to mimic human intelligence, ranging from rule based to complex reasoning

Machine Learning – “traditional AI” – learning from data patterns to predict outcomes

Deep Learning – leveraging human-like neural networks to solve complex problems, such as speech & image recognition

Generative AI – machine’s ability to predict outcome & create new content such as text, audio, video

AI Overview – It's Non-Deterministic (Random)

AI: "Generate a picture of a cat with yellow boots, holding a red umbrella, orange fur, & is standing on an English Street."



Risks & Mitigation



Risks & Consideration – Risks

Hallucination

- AI can produce non-factual information
- Response could be misleading or dangerous

Bias

- AI trained on biased data could lead to discriminatory results

Cost

- Developing, training, & maintaining models require significant resources
- API integration

Lack of Knowledge

- AI models do not think like humans
- Appear intelligent, but they don't understand the real world & can't explain their decisions

Legal Issues

- Copyright & IP infringement challenges
- Regulatory frameworks

Data

- Garbage in, garbage out
- Basis of all decision
- Data exposure

Risks & Consideration – Mitigation

Policies

- **Set the guardrails**
- Establish responsibilities
- Consider frameworks such as NIST

Experiment

- Crawl, walk, run, fly
- **Start low risk**
- Identify initial problems
- Create backlog of use cases

Technology

- Capability & Maturity led
- Different approaches
- Model selection
- Agentic systems

Training

- The basics including risks & policy
- Prompting – how to improve results
- **Build a community**

Data

- Get the data AI ready
- Consider validity
- Label data
- Robust security procedures

Governance

- Evolve the policy
- **Involve the right people**
- Review contracts
- Classify data
- **Meet regularly**

Prompting



What makes an effective prompt?



Less Effective

- ✗ **Vague**
- ✗ Just a few words
- ✗ No context on preferred output

Example: *Summarize news about [company name].*

The recap may be more vague than desired, or in a format that you were not seeking.



More Effective

- ✓ **Specific and detailed**
- ✓ In full sentences, with instructions
- ✓ States the tone, purpose, preferred format, etc.

Example: *I work in marketing and focus on competitor research. Give me a concise summary of recent news about [company name]. Focus on announcements about new product lines. Provide the answer in two to three paragraphs and use a business tone.*

But there are no "wrong" prompts because natural, conversational language is welcome.
Experiment away!

Learn how to prompt

Prompting is the process of giving instructions or asking questions to the Chatbot in natural language. You can prompt by typing your request in the prompt window. To prompt effectively, follow the below best practices:

- Use a structured system for better results
- Use clear and specific language
- Provide as much context as possible
- Use/build a prompt coach

If you are writing a prompt, it's important to focus on some of the key elements below to get the best response from Copilot

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3–5 bullet points to prepare for a meeting with Client X to discuss their “Phase 3+” XX.

Focus on Teams emails and chats since June. Please use plain language so I can prepare quickly.

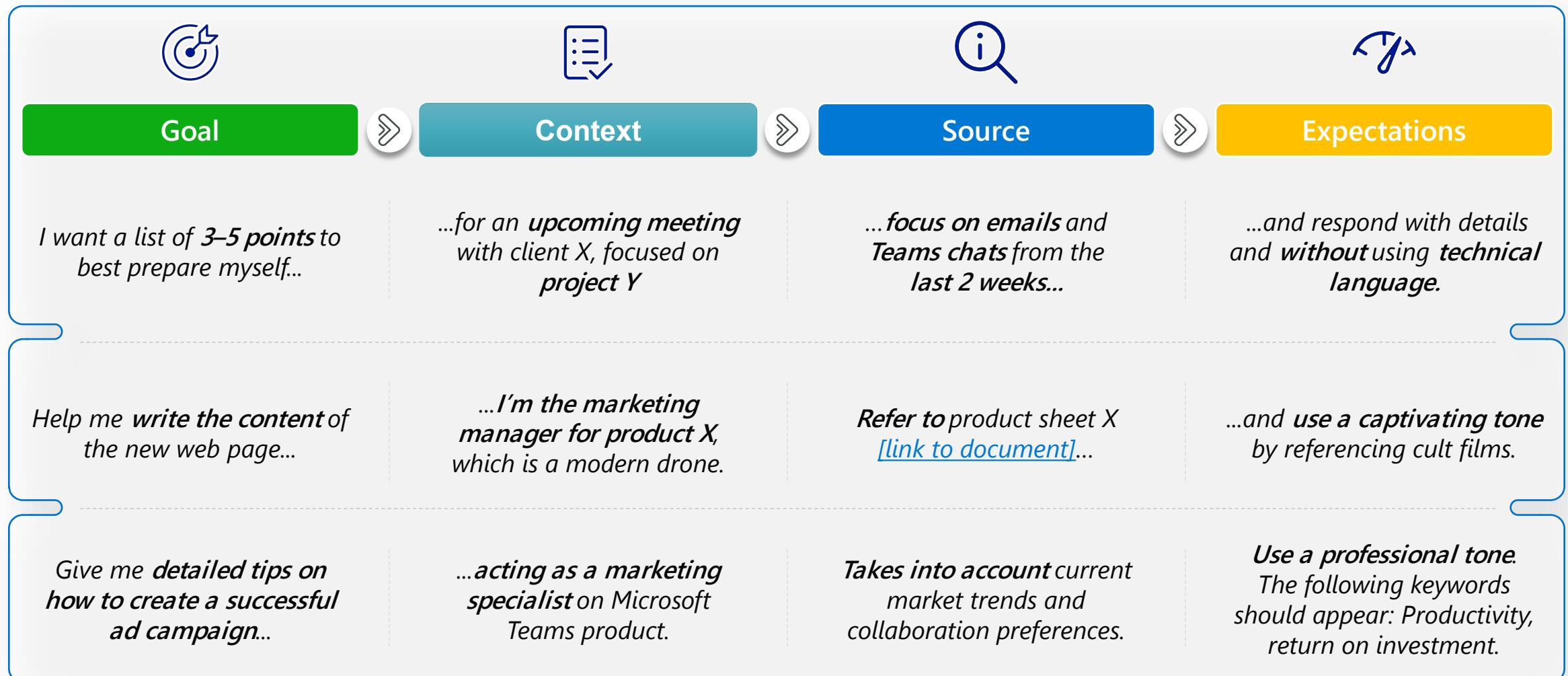
Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

The Art of Prompting – a few examples





**ABC APARTMENTS
HUD PROJECT NUMBER 012-34567**

**FINANCIAL STATEMENTS
AND SUPPLEMENTARY INFORMATION**

YEAR ENDED DECEMBER 31, 20XX

Models & Modality



Mixing Models & Modality

Omni-modal Generalists

vs

Reasoning Specialists

Examples:

OpenAI GPT 4o
Claude Sonnet 3.7
Google Gemini 1.5
Grok 4

OpenAI GPT 03
Claude Opus 4.1
Google Gemini 2.5 Pro
Grok 4

Benefits:

Faster
Creative
Iterative

Accurate
Structured
Analytical

Use Case:

Brainstorming
Content Creation
Research
Summarization

Data Analysis
Deep Research
Complex Problem Solving

Practical Use Cases



Stand Alone

Client & Market Research

1. Industry benchmarking.
2. Competitive intelligence
3. Regulatory updates
4. Emerging trends
5. Country-specific

Knowledge & Thought Leadership

6. Drafting blog posts or whitepapers
7. Curating content for newsletters
8. Preparing for speaking engagements
9. Summarizing academic or analyst reports:

Project Support & Delivery

10. Creating client-ready visuals
11. Drafting interview guides
12. Building frameworks (e.g., SWOT)
13. Translating technical jargon

Accounting-Specific Use Cases

14. Explaining accounting standards
15. Tax jurisdiction comparisons
16. Audit prep checklists

Client Engagement & Communication

17. Drafting proposals or RFP response
18. Icebreakers for hybrid meetings
19. Creating executive summaries
20. Answering client FAQs

Integrated

Document & File Intelligence

1. Summarize client deliverables
2. Compare versions of documents
3. Extract action items from meeting notes
4. Find relevant slides across decks
5. Identify & tracking edits or comments

Excel & Data Workflows

6. Explain complex formulas
7. Generate pivot tables or charts
8. Spot anomalies in spreadsheets
9. Create financial models
10. Translate Excel insights into plain language

Meeting & Collaboration Support

11. Prep for client meetings
12. Recap internal syncs.
13. Track follow-ups
14. Draft agendas with context

Accounting & Compliance Use Cases

15. Locate audit evidence
16. Validate compliance checklists
17. Automate engagement letters
18. Review workpapers for completeness

Knowledge Management & Learning

19. Surface reusable content
20. Create onboarding guides

Agentic

Deep Researcher

1. Client-specific market scans
2. Regulatory horizon scanning
3. Thought leadership drafting
4. Cross-sector trend analysis
5. Due diligence support

Analyst

6. Financial ratio benchmarking
7. Scenario modeling
8. Audit anomaly detection
9. Client segmentation
10. KPI dashboard generation

The Future (Is Here)





AI Assistants



vs

AI Agents



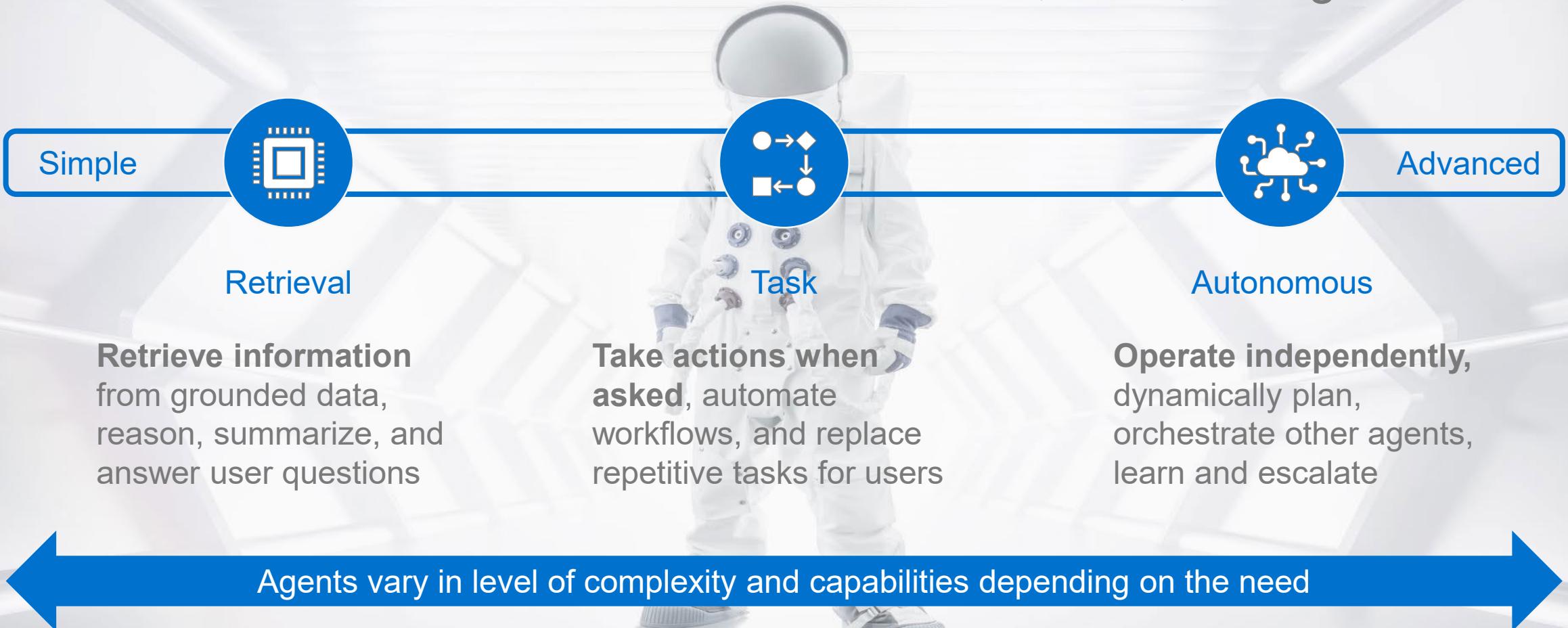
Helping me to do things



Doing things for me

Different Agents

Agents leverage AI to automate and execute processes, in collaboration with or on behalf of an individual, team, or organization.



Where Next? – Automated to Autonomous

AI Assistant

Book me a flight to Vision conference.

I see you want to book a flight. Please provide the departure and arrival airports.

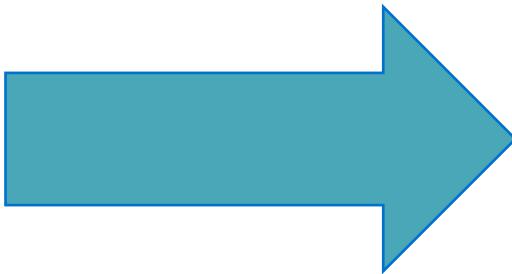
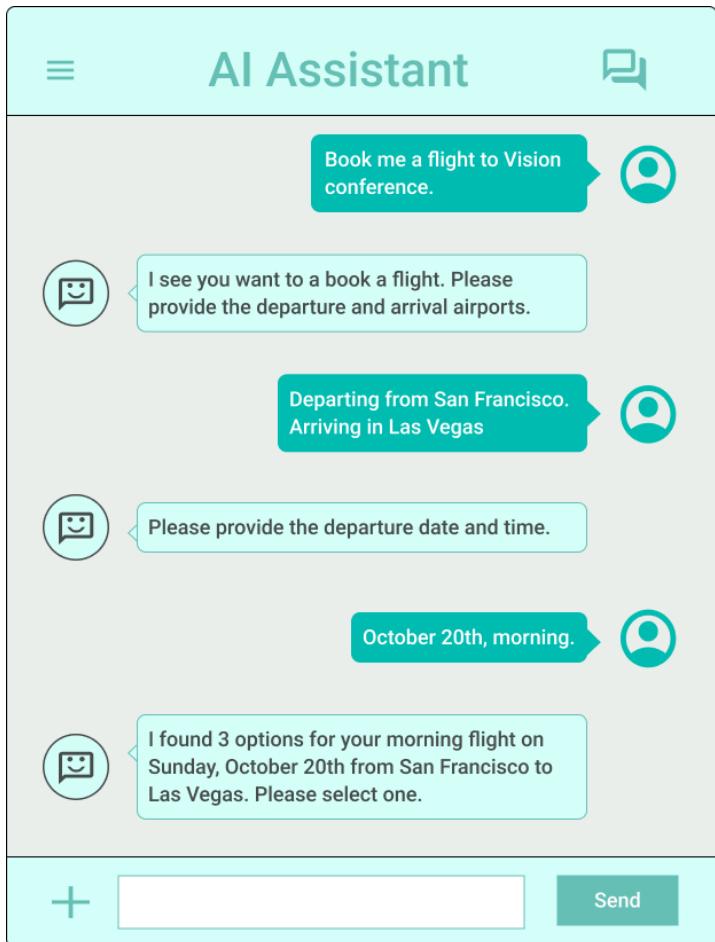
Departing from San Francisco. Arriving in Las Vegas

Please provide the departure date and time.

October 20th, morning.

I found 3 options for your morning flight on Sunday, October 20th from San Francisco to Las Vegas. Please select one.

+ Send



AI Agent

Book me a flight to Vision conference.

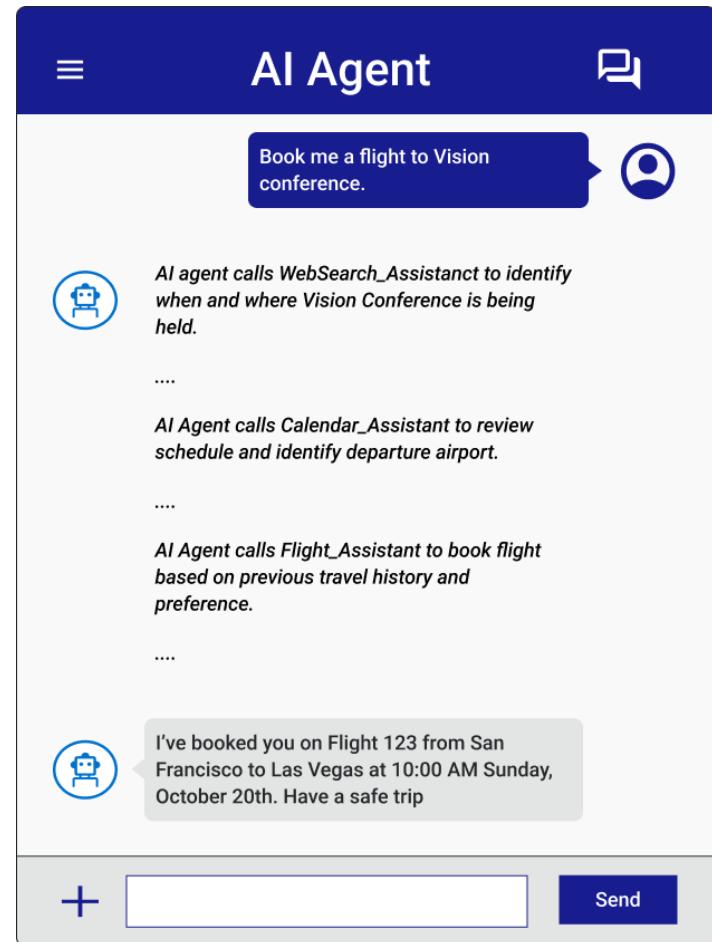
AI agent calls WebSearch_Assistant to identify when and where Vision Conference is being held.

AI Agent calls Calendar_Assistant to review schedule and identify departure airport.

AI Agent calls Flight_Assistant to book flight based on previous travel history and preference.

I've booked you on Flight 123 from San Francisco to Las Vegas at 10:00 AM Sunday, October 20th. Have a safe trip

+ Send



Best Practice



AI is a teammate, not a tool! – 8 steps of best practice

- Talking over typing
- Context Centric
- Think AI first
- Don't ask AI – get AI to ask you
- Team of Experts
- Mix models & modality
- Teammate not a tool
- Winners don't quit

- We talk faster than we type
- We read faster than we listen
- Use the in-built dictation software such as Siri (mobile) and Microsoft Dictate (desktop)

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- Leading professionals maximize context, but always think:
 - **When** do I need to add more context
 - **Where** shall I insert the context. Ensure it reads like an instruction.
 - **What** is the relevant context. Don't add an entire document when the question is about 2 pages.
 - **Summarize** the important elements

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- Don't use AI like Google; think, how can AI do this for me.
- If you do something twice, consider how AI can do it instead
- Focus on parts of your job that you would rather do less of and focus AI in those areas

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- Use the power of the tool to help it help you.
- Ask **how should I ask AI** this question.
- Get AI to come up with its own context by asking it to "**ask me one question at a time until you have all the context you need**"
- Use AI to use AI!

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- Create individual Agents with their own personas as a team of experts, or board of advisors:
 - Tax Expert
 - Strategic Analyst
 - Risk Consultant
 - Communication Expert
 - Etc.

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- Use the right model for the job
 - Does this need an Analyst Agent or Researcher?
- Am I using the right modality?
 - Would drawing something or taking notes from a whiteboard and taking a photo on the phone app be faster?
 - Could I use a recorded voice note and upload that?

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- Don't use AI, treat it like a teammate
- Provide feedback
- Provide the right levels of context
- Be specific
- Coach the AI to get the best from it
- Be iterative and don't give up early

AI is a teammate, not a tool! – 8 steps of best practice

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- Keep learning
- Keep practicing
- Stay up to date with the latest progression and releases
- Try new things often

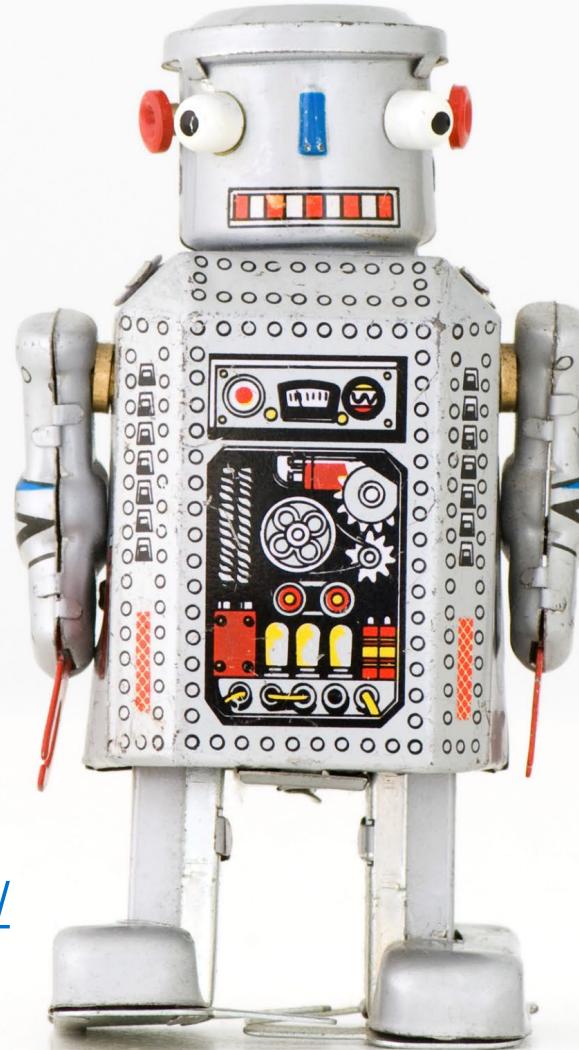
What to Do?



Things to consider

- Create a policy setting out the initial guidelines that accelerates adoption
- Get some enterprise licenses and experiment, testing models and modalities
- Find your Champions
- Create a community
- Find a problem area and focus on it – check your data
- Identify some quick win use cases
- Train your people
- Track the impact
- Get your data ready
- Meet regularly

Thank you



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