



K2's AI - Better Prompts, Better Results

What About Randy?



- 40+ years of technology experience, top-rated speaker for almost 40 years
- Top 25 Thought Leaders in Accounting 2011-2026
- 2004-2025 Accounting Today 100 Most Influential in Accounting for twenty-two years
- Inducted Accounting Hall of Fame, Feb 2011
- Monthly columns on technology in CPA Practice Advisor, weekly podcasts on technology
- Published author of six books, from Hutchinson, KS
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K2 Enterprises



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Latest Accounting Technology Lab Episodes

CPATe.ch/at/ or CPATe.ch/youtube

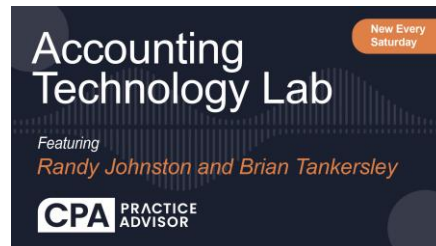


Published Episodes (Website)

- **Decision Intelligence** with Eric Eager of *4ImpactData*
- **2026 CPAPA Thought Leader Symposium**
- **Future of AI in Accounting Tech** with Joe Woodard
- **The Real State of Accounting Tech in 2026** with Joe Woodard
- **AICPA Startup Accelerator 2026**
- **Zoho Day 2026**
- **Analysis with ChatGPT 5 Pro**
- **Vibe Coding with AI**

Recorded, Will Be Released Soon

- **Generative AI in (Your) Practice**
- **Suite vs. Best in Breed**
- **Using Generative AI Projects**

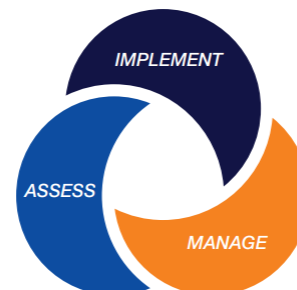


Who We Are Network Management Group Inc



- Founded in 1984, CPA-centric from the beginning
- Highly rated customer service – immediate live phone support
- Top-rated Managed Service Provider (MSP) for CPA Firms
- Private company, family-owned
- Headquartered in Hutchinson, KS
- Data center in Lenexa, KS, redundancy available

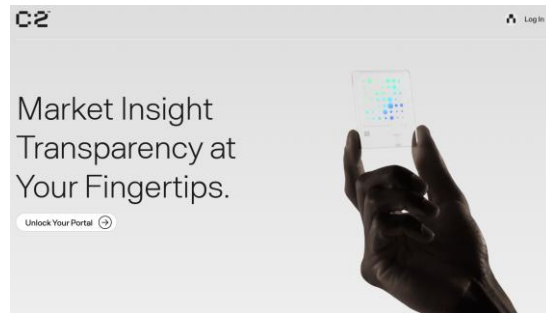
OUR APPROACH



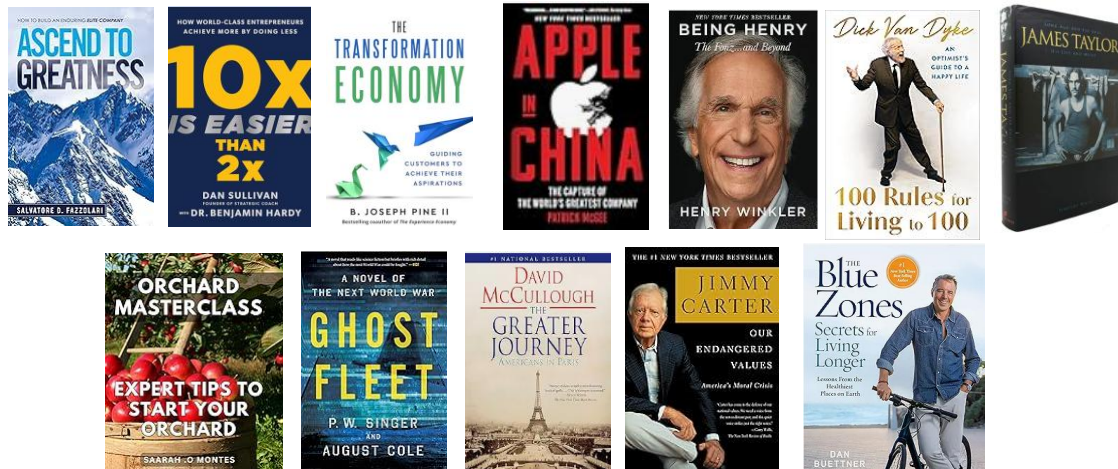
C2Acct.com - A Spin Free Site For Product Evaluation And Guidance



- **From complexity through clarity**
 - Radically simple
 - Instant value
 - Real-time, always on
 - Core features forever free
- **Actionable data**
 - Firm and vendor benchmarking
 - Dashboards with filters = meaningful insight
 - Early signals of market movement
 - No spin—noise removed
- **Real value, real privacy**
 - 700+ vendors, 1200+ products
 - Strategic Guides, on-demand insight
 - All data stays 100% private
 - **Onboard early, get ahead—start today**
 - **C2Acct.com**



2026 Recommendations



Major Topics



Components of effective AI prompts

The pros and cons of a single large prompt versus multiple small prompts

Using prompts to format AI-generated output

Today's Learning Objectives



List the four key components of AI prompts

Identify examples of prompts used for tasks, context, expectations, and output

Name at least four types of tasks generative AI tools can do when prompted correctly



WHAT IS A PROMPT?

What Is An AI “Prompt”



- It’s simple: in a nutshell, a **prompt** is how you ask a question of an AI platform or issue a command for the platform to perform a specific action on your behalf
- For example, each of the following illustrates an AI prompt
 - *What is the capital of Argentina?*
 - *Create a 500-word short story on a dog named “Ralph” and the dog’s five-year-old companion named Jamie*
 - *Analyze the financial statements, looking for unusual patterns and trends, particularly those that might indicate fraud*

What Is An AI “Prompt”



- When issuing a prompt to an AI platform, you are asking the platform to perform a task(s) for you
- In that context, issuing a prompt is somewhat like asking a search engine to find some information on your behalf
- For example, you could access your favorite search engine – such as Google – and ask it “**What is the capital of Argentina**” and (likely) you’ll get “**Buenos Aires**” as the result
- Similarly, you could use that same text as a prompt in an AI platform like ChatGPT, and (likely) get “**Buenos Aires**” as the result to your prompt

With Prompts, We Can Do More!



- Despite the similarities between AI prompts and search engines, **prompts allow you to do more – much more!**
- Because of multiple factors related to AI platforms in general (such as Large Language Models) and prompts specifically, we face far fewer limitations when asking AI platforms to do things for us as compared to asking a search engine to find a link to a piece of information
- It might be fair to say that AI can do all that a search engine can, but search engines can't do everything AI can
- And prompts are one of the key reasons why!

What Can We Do With Prompts?



- You can use AI prompts to perform one or more tasks on your behalf, such as:
 - Creating passages of text
 - Performing research on technical topics such as accounting and auditing standards or tax laws
 - Generating charts, graphs, and pictures
 - Writing computer programming code
 - Analyzing a tax return or set of financial statements – caution here!
 - Format data
 - *The sky is the limit!*

Purpose of Good Prompting



Prompting is a critical skill because the quality of AI output depends on the **precision of your instructions**.

Well-structured prompts ensure accurate, relevant work aligned with **professional standards**, while avoiding waste.

The RACE Framework



R — Role

Tell the AI who it should act like to set the tone and expertise level.



A — Action

Be specific about the task you want completed. Avoid broad requests.



C — Context

Provide the background, policy constraints, and necessary details.



E — Execute

Specify the format, structure, and delivery of the final output.

Common Prompting Mistakes

01. Being too vague

Requests like "summarize this" produce generic output.

02. Omitting policy context

The AI misses the planning issues that matter most.

03. Acceptance without questioning

Polished answers are not always correct.

04. Ignoring audience

Reports for Council need different tone than internal notes.

05. Asking for too much

Large tasks result in surface-level analysis. Prefer prompt chaining for better depth.

Prompt Chaining

Break complex tasks into a sequence of smaller, verifiable steps.



Live Demo: Generic vs. RACE

Generic Prompt

"Write a memo about the new R&D tax credit changes for my clients.."

Observe the surface-level summary and lack of accounting specificity.

RACE Prompt

*"Acting as a **Senior Tax Manager**, please write a **professional client advisory memo** regarding the Section 174 R&D capitalization rules. **The context** is that our clients are software startup owners who are concerned about the shift from immediate expensing to 5-year amortization. **The expectation** is a memo under 500 words that explains the impact on their cash flow, includes a 'Key Takeaways' summary, and provides a 'Next Steps' list for their upcoming year-end planning meeting.."*

Observe the professional tone, legal alignment, and ready-to-use structure.

Getting Better Results With GRICO



The core parts of a solid prompt

- Goal: Start by being clear about what you actually need done
- Role: Give the AI a specific job title or perspective to take
- Instructions: Walk through the steps to keep things on the right track
- Context: Share the background info so it doesn't have to guess
- Output: Say exactly how you want the final version to look

Four Key Elements Of Prompts



The task you need to perform



Context



Specific expectations



Desired output

Task To Perform



- The **task** you want your AI tool to perform is usually relatively simple...it is the primary action you want your AI platform to perform on your behalf
- Examples:
 - **Create a customer feedback summary report**
 - **Generate a listing of all vendors and their addresses**
 - **Analyze the tax return**

Context



- The **context** (optional) of the prompt is the data on which the task will act when you issue the prompt
- Examples:
 - For example, *Create a customer feedback summary report **based on the customer satisfaction scores for 2025***
 - *Generate a listing of all vendors and their addresses **for those in the Southeast region***
 - ***Analyze the tax return for errors, omissions, and irregularities on Schedule C***

Specific Expectations



- Optionally, you can instruct your AI tool on exactly what you expect in the results provided
- Identifying specific expectations helps you to ensure that you get the results that you were seeking from your prompt
- Examples:
 - ***Identify key sales trends***
 - ***Assess overall customer sentiment***
 - ***List any recurring issues or instances of exceptional performance***

Desired Output



- When specifying desired output, you're optionally indicating to your AI platform how you want the results printed
- Examples:
 - **Provide the results in a table sorted in alphabetical order based on the customer's name**
 - **Create a line chart graph to display the sales and cost of goods sold trends**
 - **Summarize the results in a bullet point list**

An Example...



- **Create a customer feedback summary report based on the customer satisfaction scores for 2025. Identify key trends in the data, assess overall customer sentiment, and list any recurring issues or instances of exceptional performance.**
- In the example above, we've created an "uber" prompt...a relatively lengthy prompt that includes all the verbiage we need to get our answer from the AI platform

There Is Another Way...



- A previous slide illustrated a complete prompt – one that contained all four elements: **1) task to perform, 2) context, 3) specific expectations, and 4) desired output**
- You could issue those as four separate, sequential prompts
- This method provides the opportunity to preview and verify each set of results before moving on to the next prompt
- It also helps to avoid “drifting” away from the prompt’s core
- If you’re relatively new to the concept of issuing AI prompts, this method might be the best way to get started

Seven Best Practices For AI Prompts



1. Be specific when issuing your prompt
2. Provide any necessary context and specificity
3. Write your prompt clearly and concisely...don't use 50 words when 10 will do!
4. Let the platform know how you want your output formatted
5. Provide examples, if available
6. Refine, refine, refine
7. Specify any relevant constraints



EXAMPLES FROM LEARNPROMPT.ORG



Zero-Shot, Few-Shot, Chain-of-Thought, And Chain of Drafts
Prompting

EXAMPLES FROM PROMPT ENGINEERING FOR ACCOUNTANTS

Sample Prompts To Create Content



- Craft a persuasive product description for a new electric car, emphasizing its eco-friendliness and cutting-edge technology
- Compose a series of tweets promoting a mental health awareness campaign using relatable anecdotes and statistics
- Draft a professional email to a potential client proposing a digital marketing collaboration
- Write an informative blog post explaining the concept of blockchain technology in simple terms
- Write a dialogue between two characters debating the ethics of artificial intelligence

Sample Prompts To Computer Code



- Write a macro to center text across multiple columns in Excel
- Generate an SQL query to retrieve the top 10 products with the highest sales revenue in the past quarter
- Explain the meaning of this Python error message and provide potential solutions
- Write an Excel Script to center text across multiple columns in an Excel worksheet

Sample Prompts For Analysis



- Analyze this dataset of stock market prices over the past year and identify any significant trends or patterns
- Create a pie chart illustrating the market share distribution of different smartphone brands in Canada
- Detect any unusual patterns or outliers in this dataset of financial transactions
- Analyze social media sentiment around a particular brand or product

Sample Prompts Images & Editing



- Remove the people from this photo of the Golden Gate Bridge
- Generate an image based on this description: 'A vibrant mural depicting the diverse cultures and cuisines of Los Angeles'
- Create an image of three dogs writing a computer program
- Create a photorealistic image of three CPAs working frantically to complete tax return on April 15

Summary



- For some, writing AI prompts can be intimidating – but it need not be!
- Following a few simple guidelines – be direct, provide clear instructions and expectations, use examples, specify formatting and filters, provide context, indicate constraints, and verifying outputs – can put you well on your way to using AI tools efficiently and effectively
- Finally, exercise appropriate professional skepticism regarding results; remember, you're ultimately accountable for the results!



Questions?

AI - Better Prompts, Better Results

Randy Johnston