

MEETING SUMMARY

How to Level Up Your AI Game

Date: September 1, 2026

■ Quick Recap

Experimentation is no longer enough. Firms that stay at the pilot stage will fall behind those moving to systematic, firm-wide implementation — and the pace of advancement in the underlying technology is what makes the difference urgent rather than theoretical. Three ideas anchored the session: where AI stands in accounting today, a maturity framework for firms adopting it, and the concept of digital brains. Covered across those: the full AI spectrum from automation through agentic systems, a three-stage maturity model assessed on four factors, a scored self-assessment against that model, and what to do with the capacity AI frees up.

■ Summary

The Current State of AI in Accounting

Accounting is mid-transformation. Where the prior year was defined by experimentation, more firms are now treating AI adoption seriously and pursuing systematic, firm-wide approaches rather than isolated pilots. The rate of advancement in the underlying technology is what makes the shift pressing: firms still in the experimentation phase risk losing competitive ground to those that have already moved past it.

The AI Spectrum: Automation Through Agentic Systems

AI is a spectrum rather than a single capability, running from rule-based automation and machine learning through generative AI and, most recently, agentic AI. Agentic systems are the significant development: rather than answering a single prompt, they decompose a complex task into subtasks and work through them in sequence, which produces more accurate results on multi-step work. A live demonstration in Claude Cowork built a morning briefing from scratch to show that decomposition in practice.

Security and Compliance of Agentic AI

Is the security and compliance of agentic AI fact or fiction? Polled live, most of the room answered fiction — with the qualification that the answer depends on the IT security protocols a firm already has in place. The tooling itself matters less than the controls surrounding it.

An AI-Native Maturity Framework

The framework rests on three stages — foundations, integration, and transformation — assessed across four factors: people, process, technology, and growth. A firm locates itself on each factor independently rather than claiming a single overall maturity level, because most firms sit at different stages depending on which dimension is examined.

Scored Self-Assessment

An interactive exercise scored firms against a set of AI implementation criteria drawn from the framework, with results compared across the room and the highest score reaching 15 points. The value of the exercise lies in surfacing the weakest factor: the lagging dimension — typically people or process rather than technology — is what limits overall progress.

Digital Brains and AI as a Thought Partner

A working setup built around Cursor and Claude Code illustrated using AI to think through problems rather than only to produce output faster. The distinction is between AI for productivity, which compresses tasks that already exist, and AI as a thought partner, which participates in framing the problem itself. The digital brain concept covers accumulating context and reference material so the tools operate with knowledge of a firm's own work rather than from generic assumptions.

Converting Saved Time Into Revenue

Recovered capacity is best directed toward business development and cross-selling into the existing client base rather than absorbed as additional compliance volume. Capacity reinvested in growth compounds; capacity absorbed into throughput does not.