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Building AI Systems for the Toughest Hours in Accounting

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# HIRE THE AGENT

Delegate your most time-consuming tasks to AI so you can focus  
more on growing your business and caring for your clients



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28 Year Advertising and Management Veteran

- Copywriter in El Estudio/BBDO Barcelona Spain
- Creative Director and Strategic Brand Planner in Publicis JimenezBasic Manila Philippines
- Managing Director Publicis Dialogue Kuala Lumpur
- Chief Executive Officer Tagline 360 Boston, New York, Sacramento, Providence, London, Dubai, Manila

Inspirational Speaker and Trainer

- USA, Philippines, Singapore, Malaysia, China, Australia, New Zealand, UK, Portugal, Hong Kong, Taiwan



Take Tedious Work Off Your Plate

Challenge Your Thinking

Turn Information into Action

# What AI is Really Good At



AI is NOT supposed to do your thinking for you.

AI is NOT supposed to make the final decision for you.

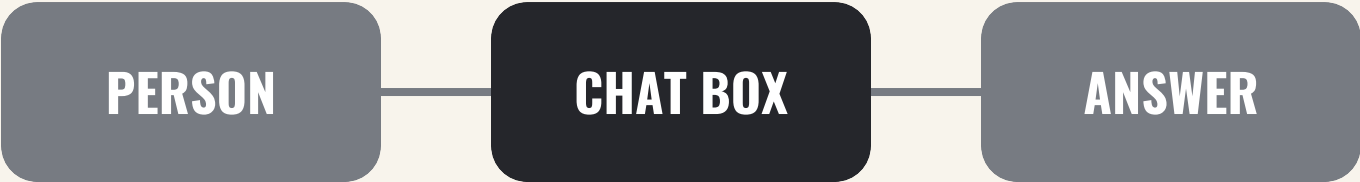
AI is NOT supposed to replace your judgement, experience or creativity

# NOT the job of AI



# Beyond “Ask a Chatbot”

**CHATBOT**



Fine for email. Useless for accounting work.

**AGENT**



Built for multi-file, multi-step work that repeats.

**WORKS IN YOUR FILES**  
Folders, PDFs, spreadsheets

**REMEMBERS**  
Client context + standards

**HAS CHECKPOINTS**  
Humans review what matters

# Two Systems that an AI Agent is Good for

## **Month- End Close Reconciliation**

15 Subsidiary Trial Balances  
200+ GL Accounts

## **Lease Abstraction ASC 842**

20+ lease PDF's → Structured Schedule  
What are ambiguities you need to  
review?

Both repeat every month. Both have human checkpoints. Both reclaim  
time wasted on busywork.

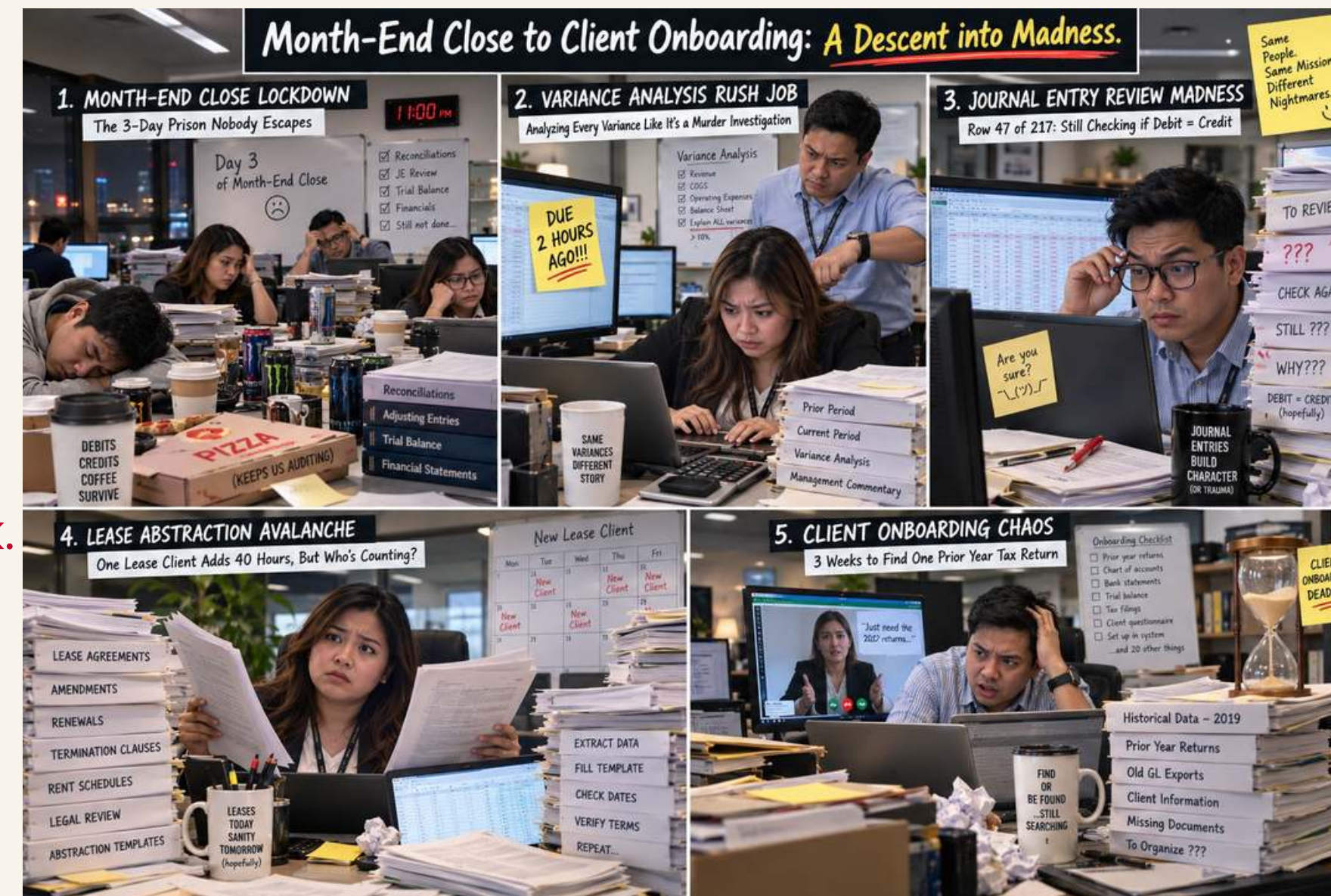
# 10 Tedious Accounting Tasks That an AI Agent Can Help You With

- Workpaper Assembly – Your people waste 20+ billable hours per audit on filing instead of client work—that's thousands in margin you're literally burning.
- PBC Chasing – You're delayed every month waiting for documents, your clients are annoyed at slow turnarounds, and your team's billable hours are tanked.
- Email & Document Chaos – Your firm has zero filing system; people search email like it's Google—this is why you can't scale without hiring more staff just to find things.
- Tax Research Memos – Your best people spend 6 hours pulling research when they could be doing \$300/hour advisory work—you're paying advisory rates for research work.
- Contract Review & Abstraction – You're either missing lease terms and revenue issues (risk), or burning hours on manual extraction when your team could be advising clients.



# 10 Tedious Accounting Tasks That an AI Agent Can Help You With

- Month-End Close – Your whole team is tied up for 3-4 days doing reconciliation, preventing them from doing advisory work or taking on new clients.
- Variance Analysis – This is actual advisory work clients pay for, but right now it's rushed busywork instead of strategic insight that could be billed out.
- Journal Entry Review – 200+ entries to verify means quality issues slip through, and you're paying senior people to do error-checking instead of client-facing work.
- Lease Abstraction for ASC 842 – Every new lease client adds hours of manual work; this is a scaling blocker for compliance-heavy clients.
- Client Onboarding – New clients take 3+ weeks to fully onboard because you're manually organizing historical data—this blocks revenue and delays work.



# How Tagline 360 Can Help

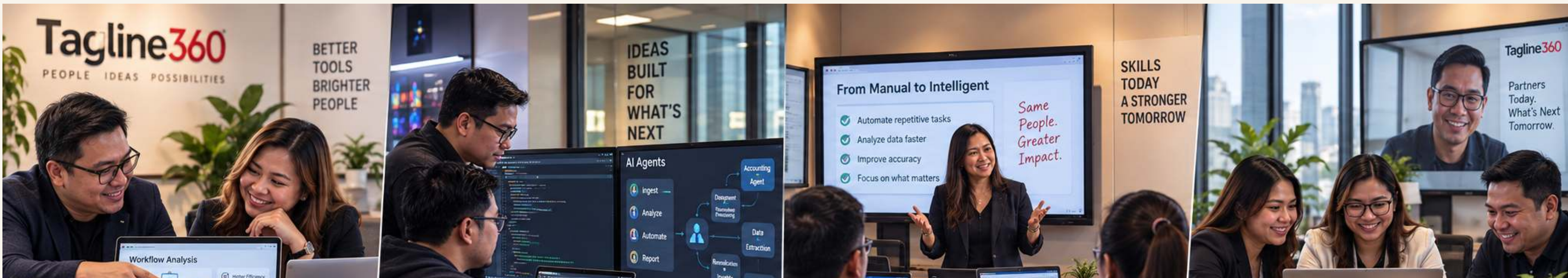
Build AI systems that help your firm maximize its productivity and scale up

## AI Systems Set Up

- Identify high-impact workflows
- Build custom AI agent
- Integrate with your tools
- Train your team
- Launch & maintain

## AI Training

- Prompting fundamentals
- Workflow design
- Live training on real work
- Ongoing support
- Custom for your firm



# How Tagline 360 Can Help

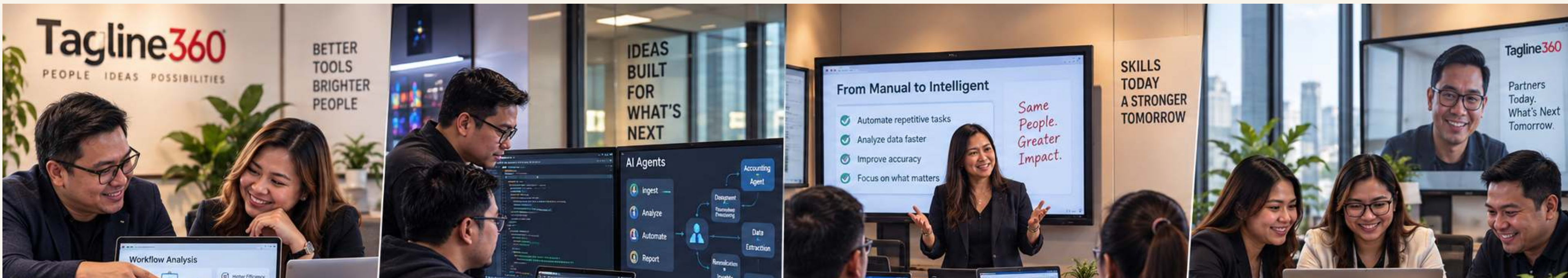
Get discovered by the right clients

## The Problem

- 77% search AI before Google
- If you're not visible, competitors are
- Your name = zero leads from AI

## GEO

- Answer Layer audit
- Build your AI visibility
- Stay competitive
- Get named in answers



**Hop on a call with me or talk to me outside!**

**Free 30 – minute** Accounting Firm AI Readiness Consult



**How this will help you:**

- **OPERATIONS** — Which workflows are costing you the most time and money right now, and which one we should automate first
- **VISIBILITY** — What AI currently knows (or doesn't know) about your firm, and how many prospects are finding your competitors instead of you
- **GROWTH** — Your competitive gap: where you stand vs. firms already winning on AI, and the one thing you can do this week

**What should your next step be?**