Future-Proofing Firms: AI for Professional Services

armanino

Your Presenter:

Carmel Wynkoop
Armanino Partner in Charge
AI, Automation & Analytics
Carmel.Wynkoop@armanino.com

The Conversation has changed

Denial & Skepticism

"Should we be using these tools?"

"Let's block Chat GPT."

"Is Gen AI another tech fad?"

"I think we should wait a while."

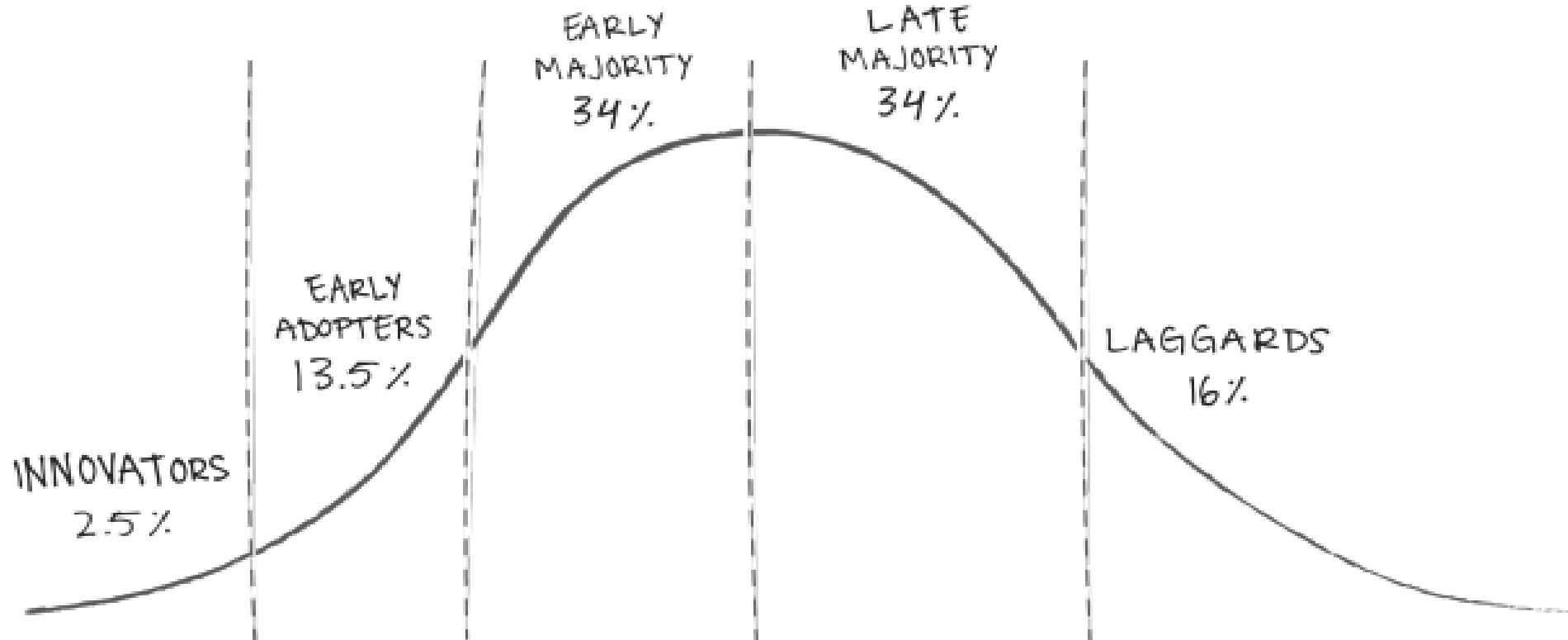## Realization and Optimistic

"How can we use AI today?"

"People are using it without permission."

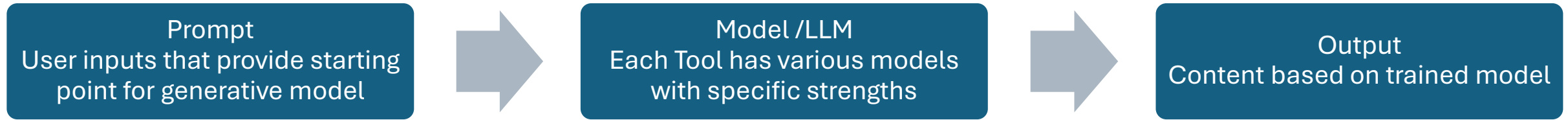"This is how we work moving forward?"

"We can't afford to wait."
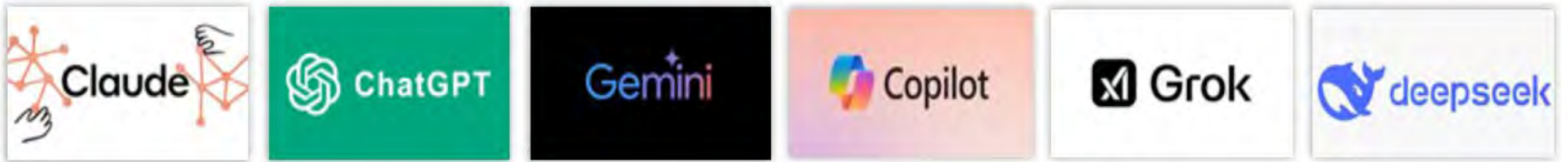
Everyone will not adopt AI at the same time.

	Innovators	Early Adopters	Early Majority	Late Majority	Laggards
Mindset	Love being first, curious, embrace AI experimentation.	Strategic, influential, willing to lead with some evidence.	Practical, want proof before changing.	Skeptical, need hand-holding, fear disruption.	Resistant, traditional, last to adopt.
How to Lead	Give them tools, autonomy, and let them pilot new AI ideas.	Engage them in shaping AI vision and driving buy-in across teams.	Show clear business wins and case studies; offer training.	Focus on ease-of-use, peer pressure, and ongoing support.	Address fears slowly; may only adopt when required to stay viable.

How to use Generative AI?

Prompt User inputs that provide starting point for generative model	→	Model /LLM Each Tool has various models with specific strengths	→	Output Content based on trained model

1 Platform

Claude   ChatGPT   Gemini   Copilot   Grok   deepseek

2 Version

FREE   PAID   TEAM   BUSINESS   ENTERPRISE

3 Models

Chat GPT 4.0 → Mini → Deep Research → Flash → Pro → Personalized → Veo - Video
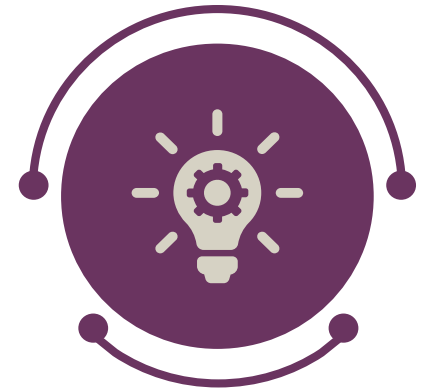
High Impact Custom AI Solutions

Robotic Process Automation
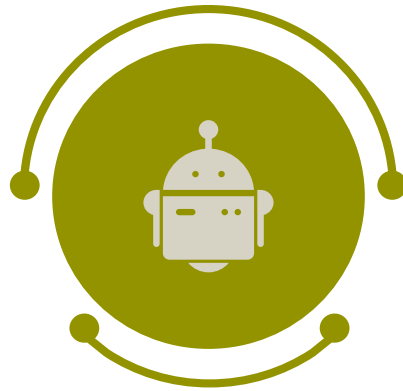
Internal & External Natural Language Chatbots

System Integrations and Automations
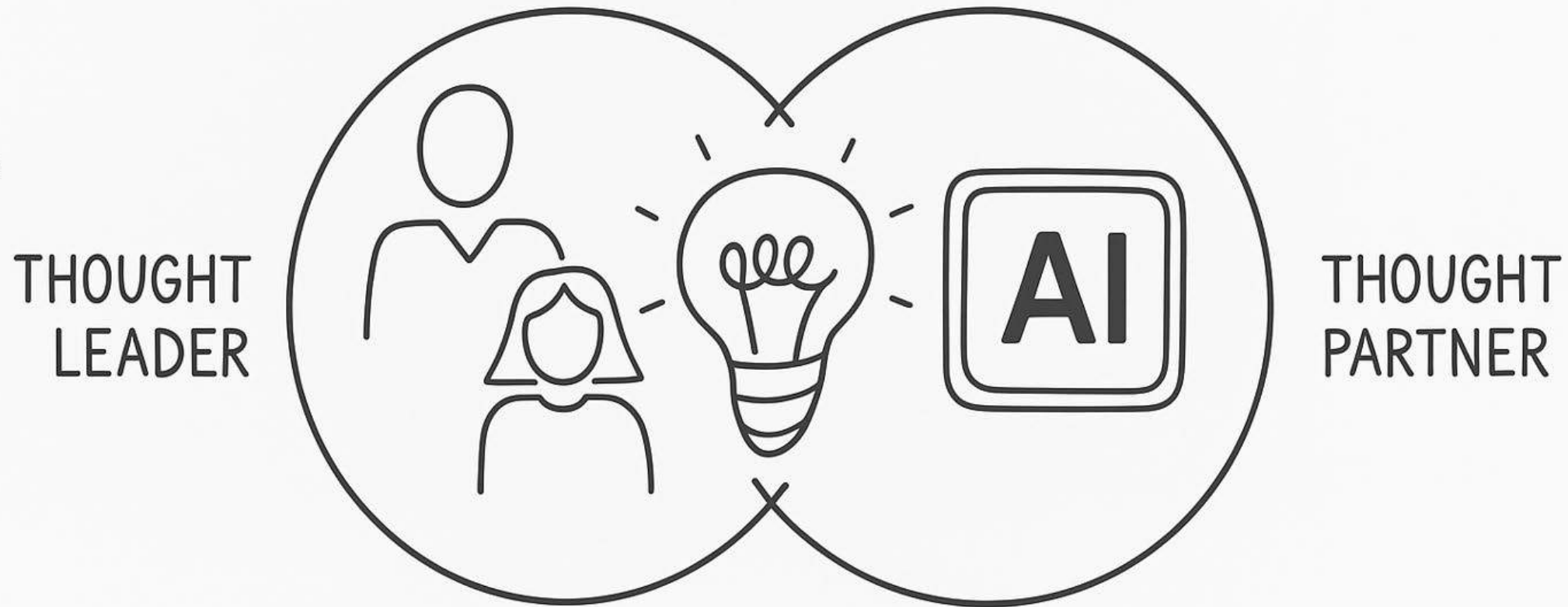
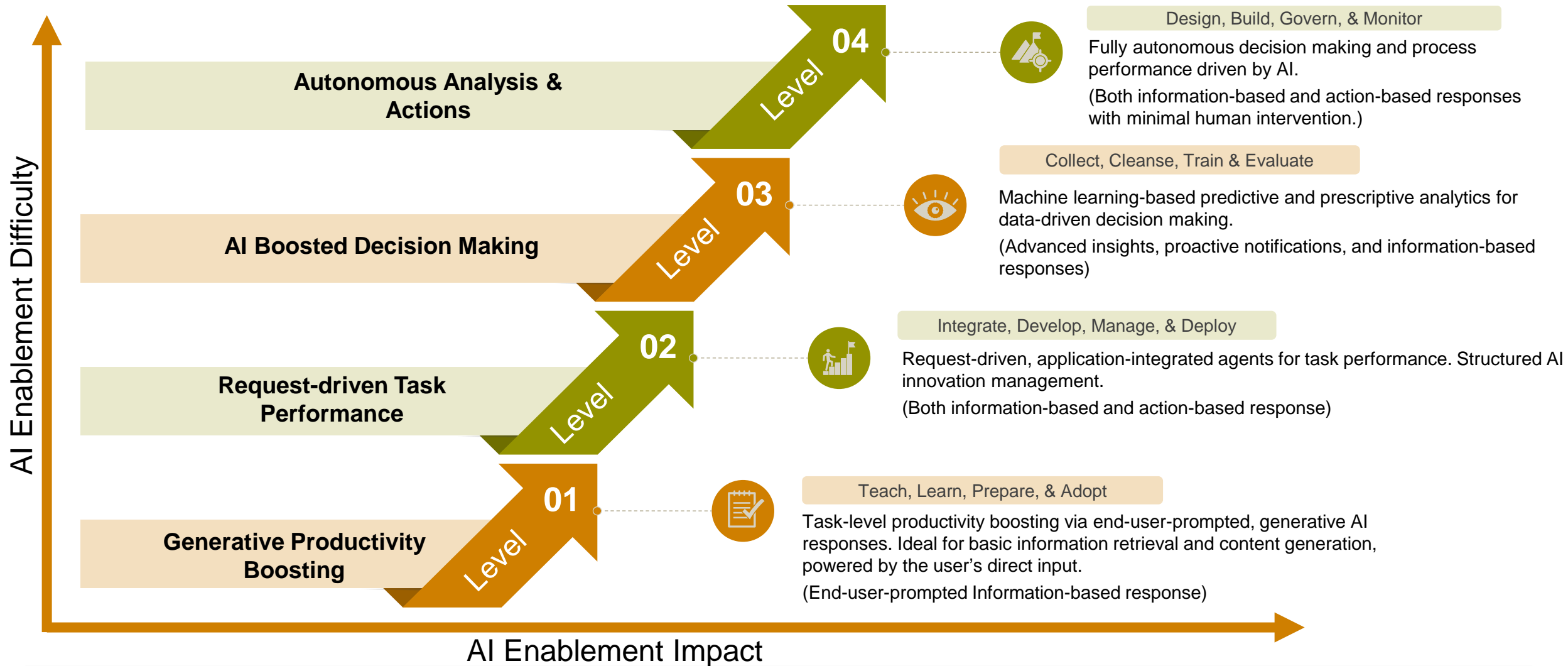**Predictive Analytics and Forecasting**

AS YOU DEVELOP YOUR RELATIONSHIP WITH AI, YOU MUST ACKNOWLEDGE THAT ONE OF YOU WILL PLAY THE "THOUGHT LEADER" ROLE AND OTHER THE "THOUGHT PARTNER" ROLE

THOUGHT LEADER

THOUGHT PARTNER

Armanino's AI Enablement Framework

HOW TO MAXIMIZE THE IMPACT OF YOUR AI ENABLEMENT JOURNEY

AI Enablement Difficulty

04 — Level

Autonomous Analysis & Actions

Design, Build, Govern, & Monitor

Fully autonomous decision making and process performance driven by AI.

(Both information-based and action-based responses with minimal human intervention.)

03 — Level

AI Boosted Decision Making

Collect, Cleanse, Train & Evaluate

Machine learning-based predictive and prescriptive analytics for data-driven decision making.

(Advanced insights, proactive notifications, and information-based responses)

02 — Level

Request-driven Task Performance

Integrate, Develop, Manage, & Deploy

Request-driven, application-integrated agents for task performance. Structured AI innovation management.

(Both information-based and action-based response)

01 — Level

Generative Productivity Boosting

Teach, Learn, Prepare, & Adopt

Task-level productivity boosting via end-user-prompted, generative AI responses. Ideal for basic information retrieval and content generation, powered by the user's direct input.

(End-user-prompted Information-based response)

AI Enablement Impact

Many Productivity Platforms now have Embedded Solutions

Ongoing Training & Evaluation

Goal is User ADOPTION

Don't STOP at IMPLEMENTATION

Sample High-Level Plan Over Six Weeks

"M365 Copilot's Cosmic Adventure": Space Exploration Theme

Week 1: Launch Day
- Sign User Agreement / Responsible AI Usage Policy
- Join the "M365 Copilot Cosmic Adventure" Microsoft Team / Cohort 1 Channel
- Attend a one-hour "Art-of-the-Possible" M365 Copilot Education Session
- Launch awareness campaign (emails, teams posts)
- Attend a one-hour design thinking workshop to define value levers

Week 2: Navigating New Frontiers
- Conduct use-case based 30-minute training sessions for M365 Copilot in:
  - Teams
  - Word
  - PowerPoint
  - Excel
  - M365 Chat
- Hold a one-hour office hours call for feedback
- Send first survey

Week 3-6: Discovering Alien Productivity
- Publish Daily Snackable Education in Teams
- Publish 2 Prompts per week in Teams
- Collect feedback via weekly office hours and survey
- Monitor usage and track adoption metrics via Copilot Dashboard
- Adjust training and support strategies as needed

Week 7: Mission Accomplished
- Conduct project review meeting with executive sponsors and change agent team
- Analyze feedback and adoption metrics
- Analyze and produce Value Framework Deliverable
- Document lessons learned and best practices
- Prepare to Onboard Cohort 2 (Week 8)

Two Flavors of AI: Agentic vs Generative

GenAI

Creative Intelligence
Supports innovation by generating new ideas, content, or solutions

Legal Example: AI drafts messaging for a new client services offering

Context-Driven Content Creation
Produces written, visual, or data summaries from prompts

Legal Example: AI summarizes a deposition transcript into a case brief

Human-Like Personalization
Tailors responses to fit audience, tone, and context

Legal Example: AI drafts a follow-up email to a general counsel using firm-specific insights

Agentic AI

Goal-Oriented Automation
Executes tasks with clear objectives, often with minimal human involvement

Legal Example: AI triggers a case intake notification when new client data hits the portal

Task & Workflow Execution
Follows defined workflows to complete repetitive, high-volume processes

Legal Example: Auto-generates conflict checks and engagement letter drafts for new matters

End-to-End Process Automation
Manages complex operations from input to action

Legal Example: AI routes and escalates contract approvals across departments with audit trail tracking

If GenAI is your brainstorm partner, Agentic AI is your best employee.
One thinks with you. The other acts for you.

Example Use Case Solutions

Instead of asking "How I might do this?" .... Ask yourself "How might AI help me do this?"
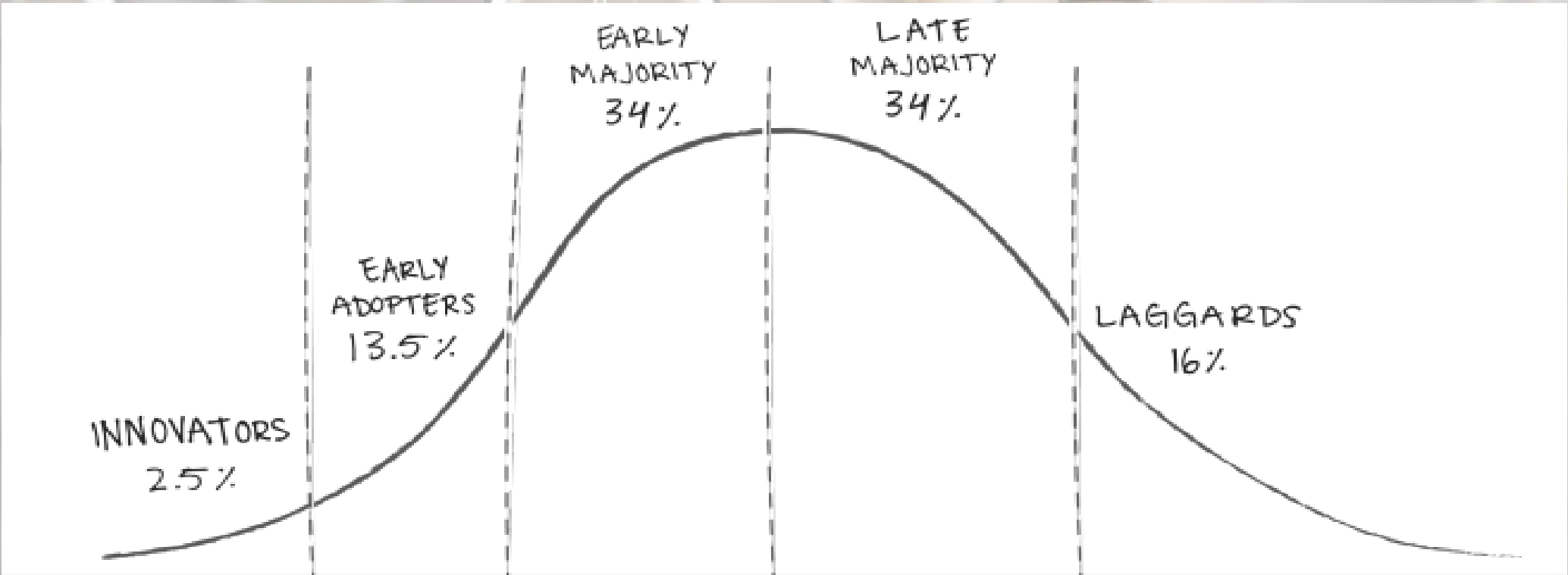
AI for Onboarding & Knowledge Transfer

Use Cases:

- AI-driven onboarding assistants can guide new consultants, analysts, or associates through firm policies, client engagement protocols, and software tools.

- Document summarization bots can automatically generate concise overviews of past client projects, proposals, or internal playbooks.

- Interactive knowledge bases (trained on internal firm data) allow new hires to ask natural-language questions and get reliable answers such as "What's our process for client onboarding?" or "Where is the latest tax compliance checklist?"

Benefits:

- Reduces training time by 30–50%.

- Makes firm-specific institutional knowledge searchable and persistent.

- Supports remote onboarding without over-reliance on individual trainers.

Everyone will need the same amount of training.

Adoption Group	Innovators	Early Adopters	Early Majority	Late Majority	Laggards
Key Traits	First movers, curious, love experimenting, willing to take big risks.	Trendsetters, respected thought leaders.	Practical, adopt once they see proven success and social proof.	Skeptical, adopt out of necessity or pressure once it's mainstream.	Resist change, traditionalists, may only adopt when there's no other option.
Training Importance	Low	Moderate	High	High	Low to Moderate
Why	They learn by doing; prefer experimenting over structured training.	They value strategy and insight more than formal training.	They need evidence, structure, and confidence before embracing change; training = trust.	Also benefit from training, but by this point the program should already be proven and refined.	May only train because they're forced to adopt; skeptical of even well-run programs.

AI for Business Development & Marketing

Use Cases:

- AI-powered analytics identify cross-selling and upselling opportunities based on client data and industry trends.

- Proposal generation tools create tailored pitches using prior successful engagements as templates.

- Natural language generation produces personalized marketing content for target client segments.

Benefits:

- Increases win rates through data-backed proposals.

- Reduces proposal turnaround time from days to hours.

- Improves marketing ROI by targeting the right prospects with tailored messaging.

AI for Project Delivery & Client Service

Use Cases:

- Automated document review tools scan contracts, compliance forms, or technical specs for potential issues.
- AI meeting assistants transcribe client calls and extract key action items.
- Predictive analytics forecast project risks and recommend mitigation steps before they escalate.

Benefits:

- Improves accuracy and reduces human error in deliverables.
- Enhances client trust through proactive communication.
- Allows teams to focus on strategic, high-value work instead of routine checks.

AI for Compliance & Risk Management

Use Cases:

- Regulatory monitoring bots track changes in laws and standards, alerting teams to necessary updates.

- AI-driven audit tools detect anomalies or potential compliance breaches in financial data.

- Privacy scanners identify sensitive client information to ensure proper handling under GDPR/CCPA.

Benefits:

- Reduces compliance risk and potential penalties.

- Improves audit efficiency by automating routine checks.

- Maintains client trust through rigorous data protection.
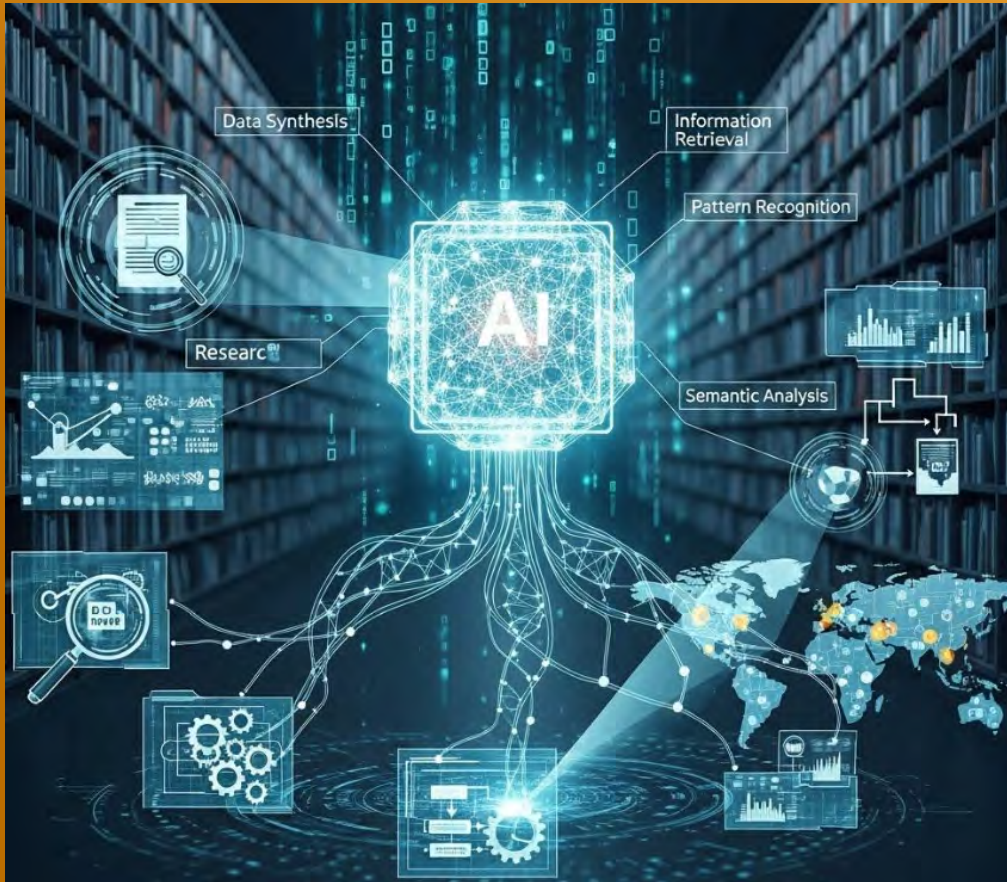
**AI for Knowledge Management & Research**

Use Cases:

- AI search assistants retrieve relevant case studies, templates, and reports instantly from internal repositories.

- Text mining tools extract insights from large volumes of legal, tax, or industry documents.

- Sentiment analysis tools scan client feedback to identify satisfaction trends and emerging issues.

Benefits:

- Reduces research time from hours to minutes.

- Ensures decisions are backed by the latest firm-wide knowledge.

- Helps identify opportunities to enhance client service.

Live DEMO

Generative & Embedded AI
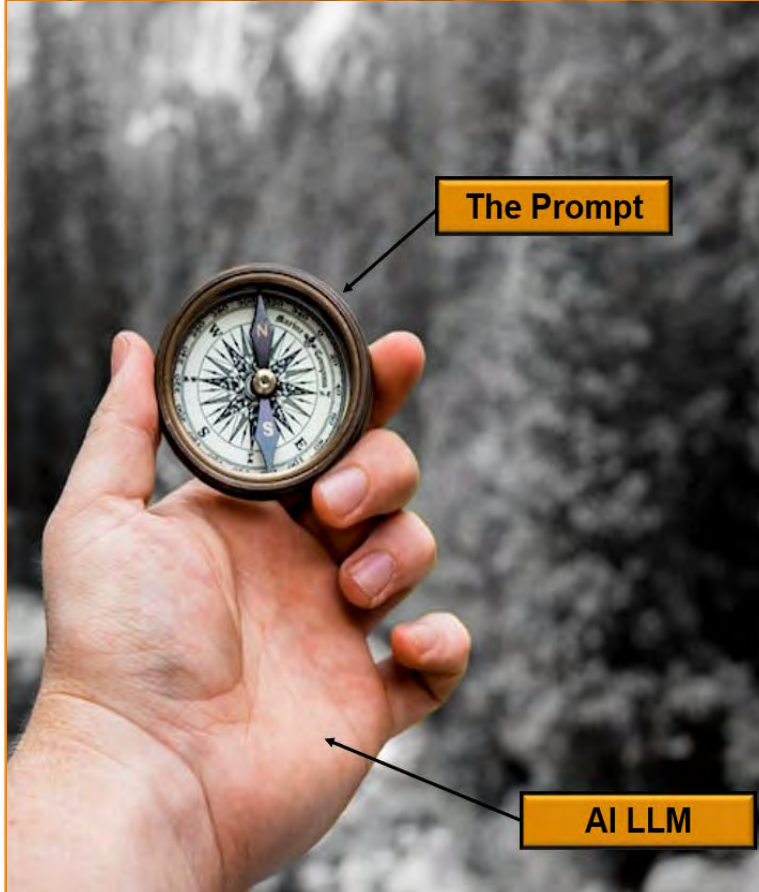
- **Open AI's Chat GPT**
  - **Custom GPTS**

- **Microsoft's Copilot**
  - **Custom Agents**
  - **Embedded AI**

- **Google Gemini**
  - **NotebookLM**
  - **VIDs**

The Prompt

AI LLM

Demo: Funding Reconciliation