Using AI in the Workplace

Practical AI Tools for CFOs & Controllers in Private Country Clubs

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Today's Agenda

- The 4 Steps to Better AI Prompting
- Does ChatGPT Hallucinate?
- Best AI Tools to Use in 2026
- Understanding AI's Role in Finance
- Financial Analysis & Forecasting
- Member Data & Board Reporting
- Operational Efficiency (Email, Documents, Meetings)
- ChatGPT Research 5.2 & Projects
- Security & Compliance
- Getting Started with AI
- Real-World Results & Time Savings
- Your Next Steps

The 4 Steps to Better AI Prompting

01

Set Your Role

Act as a CFO of a private country club...

02

Explain Your Task

I am trying to analyze these financial statements...

03

State Your Desired Output

I want to write a one-page analysis for the board...
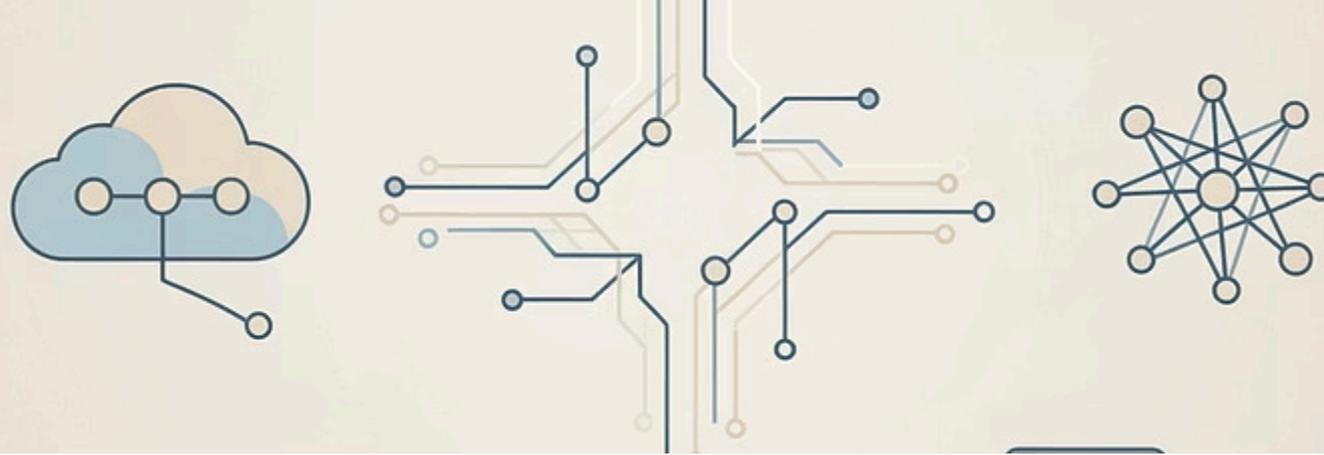
04

Specify the Format

Produce this in a Word document.

The more specific you are, the better results you'll get

Does ChatGPT Hallucinate?

Yes!

Better Prompts = Better Results

Before Your Chat

If you're not sure, say "I don't know." Don't guess - Ask clarifying questions first.

After You Answer

Self-check: Did you cover every request? Any contradictions or format misses? If yes, revise then recheck.

Best AI Tools to Use in 2026 by Category

General AI Assistants

- **ChatGPT** – Fast, reliable, best all-around for general business tasks.
- **Claude** – Excellent for complex reasoning and generating clean, well-structured text.
- **Gemini** – Strong Google alternative, versatile across various use cases.
- **Perplexity** – Ideal for research requiring verifiable sources.
- **Copilot** – Microsoft ecosystem's integrated AI assistant.
- **Grok** – Best for trending topics and cultural insights (X World).

Writing

- **Grammarly** – Essential for grammar corrections and writing refinement.
- **Jasper** – Great for content generation, marketing copy, and idea generation.
- **Writesonic** – Useful for generating quick drafts and content variations.

Design / Images

- **Gemini Nano Banana** – My go-to for high-quality AI-generated visuals.
- **Midjourney** – Strong for creative artwork and innovative concept designs.
- **Canva** – For quick image edits, templates, and simple AI generation.
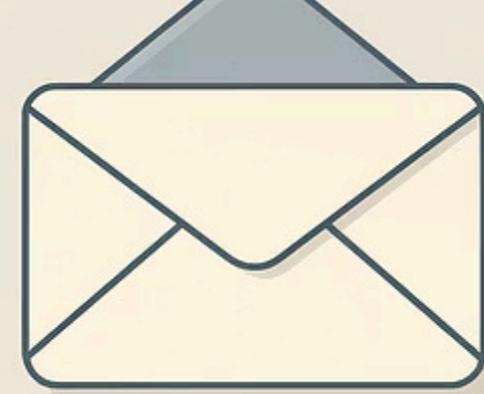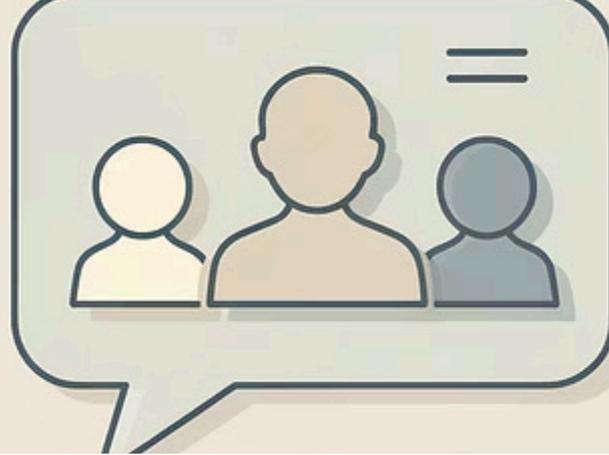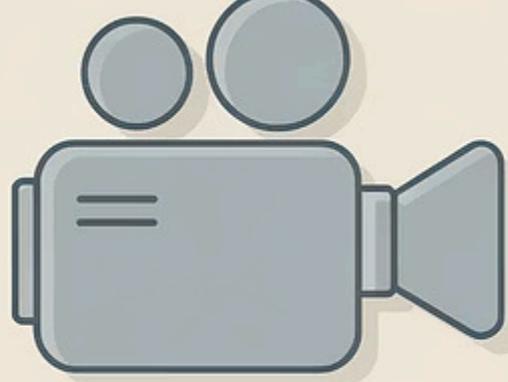
Best AI Tools to Use in 2026 by Category (continued)

Video

- **Veo** – User-friendly AI-powered video editing.
- **Kling** – Reliable for efficient short-form content creation.
- **Higgsfield** – Good for experimental AI video concepts.

Meeting

- **Granola** – Provides clean AI support without call interference.
- **Fireflies** – Automates transcription and meeting note-taking.
- **Otter** – Captures meetings and provides searchable transcripts.

Presentation

- **Gamma** – Sleek, fast, and highly efficient for presentation design.
- **Beautiful** – Offers automated templates for professional presentations.
- **Pitch** – Collaborative and design-focused tool for team presentations.

Email

- **Gmail** – Continuously improving with reliable AI features.
- **Superhuman** – Enhances email workflow with AI-assisted shortcuts.
- **Mailshake** – Specialized for email campaigns and outreach.

The Challenge You Face

- Managing complex member billing and seasonal revenue fluctuations
- Balancing operational costs across multiple departments (F&B, golf, facilities)
- Limited finance team resources with increasing reporting demands
- Need for real-time insights to support board and committee decisions

What AI Can Do For You

→ Automate repetitive tasks and reclaim 5-10 hours per week

→ Generate insights from data faster and more accurately

→ Improve forecasting and scenario planning

→ Enable strategic focus instead of manual data work

AI Tools for Financial Analysis

Automated Financial Reporting

Traditional Approach

- Manual data extraction from multiple systems
- Hours spent on Excel formatting
- Risk of human error
- Reports take days to compile

With AI

- Automated data consolidation
- Instant report generation
- Consistent accuracy
- Real-time dashboards available 24/7

Variance Analysis Made Simple

- AI identifies unusual patterns and anomalies automatically

- Explains variances in plain language

- Highlights areas requiring immediate attention

- Suggests potential causes based on historical data

Instead of spending 3 hours analyzing why F&B costs spiked, AI flags the issue and provides context in seconds
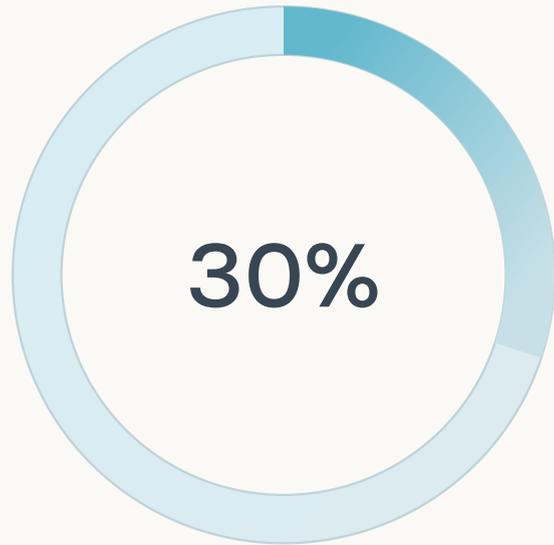
Forecasting & Budgeting

AI-powered forecasting helps you:

- Predict seasonal revenue patterns with greater accuracy
- Model different scenarios (weather impacts, event bookings, membership trends)
- Adjust budgets dynamically based on real-time performance
- Identify cost-saving opportunities before they become problems

30%

Forecast Accuracy

Improve by up to
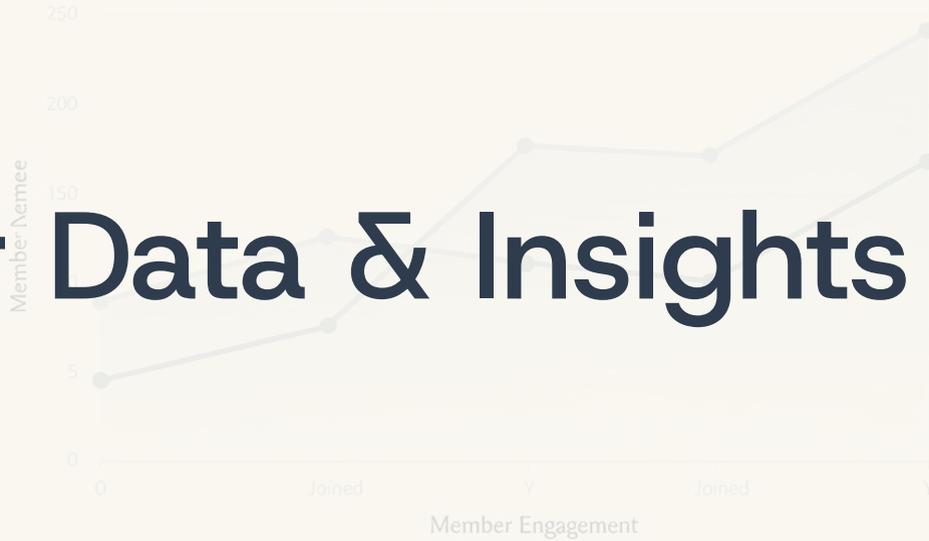
Member Data & Insights

Understanding Member Behavior

AI analyzes member data to reveal:

Usage Patterns

across amenities (golf, dining, tennis, pool)

Spending Trends

by member category

Churn Risk Indicators

identify members at risk of leaving

Targeted Opportunities

for promotions or new services

> 🗒 **Benefit:** Make data-driven decisions about capital investments and service offerings

Automated Board Reporting

Generate comprehensive board packets in minutes:

Executive summaries

written in clear, professional language

Key metrics and KPIs

automatically updated

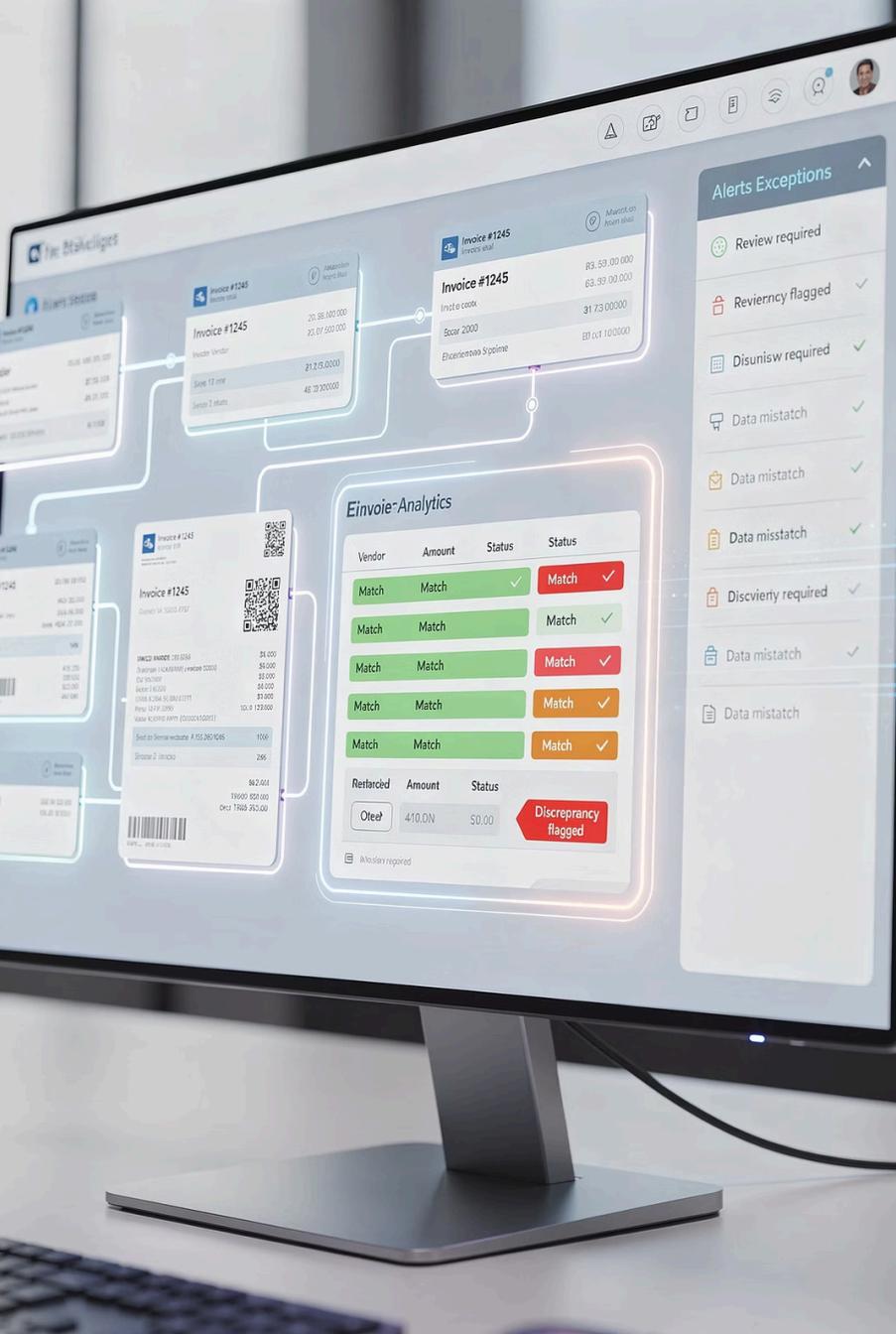### Visualizations

that tell the story

Customized views

for different committees (finance, membership, golf, etc.)

Time saved: 4-6 hours per board meeting

Operational Efficiency

Invoice Processing & AP Automation

01

AI extracts data from invoices (any format)

02

Matches to purchase orders automatically

03

Routes for approval based on your rules

04

Flags discrepancies for review

Result: Process invoices 10x faster with 99% accuracy

Smart Email Management

AI helps you manage your inbox:

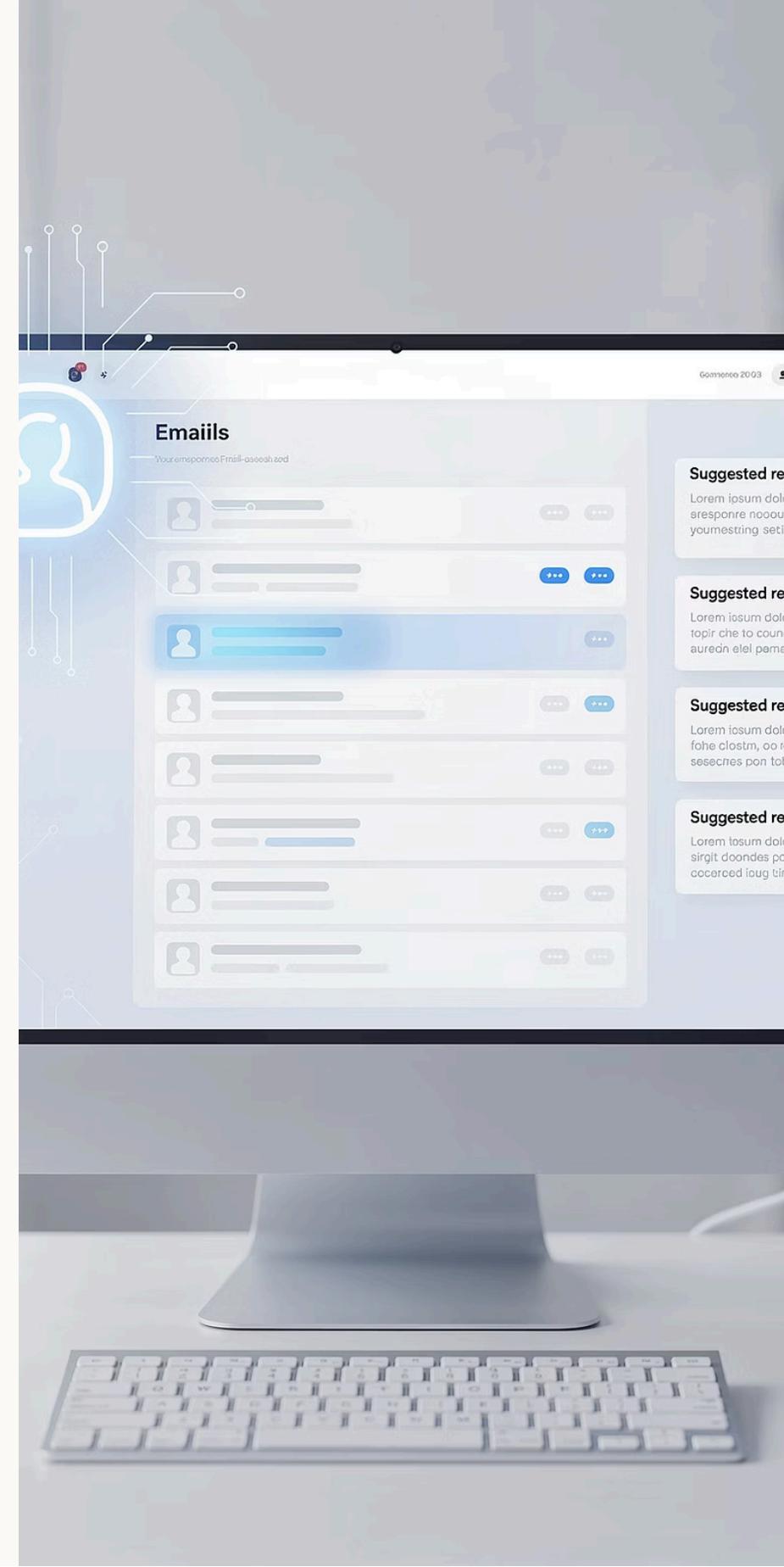⭐ Prioritizes urgent financial matters

✏️ Drafts responses to routine inquiries

📄 Summarizes long email threads

📋 Extracts action items and deadlines

🗒 **Reclaim 1-2 hours daily from email overload**

Contract & Document Analysis with Projects

AI reads and analyzes contracts instantly:

- Vendor agreements
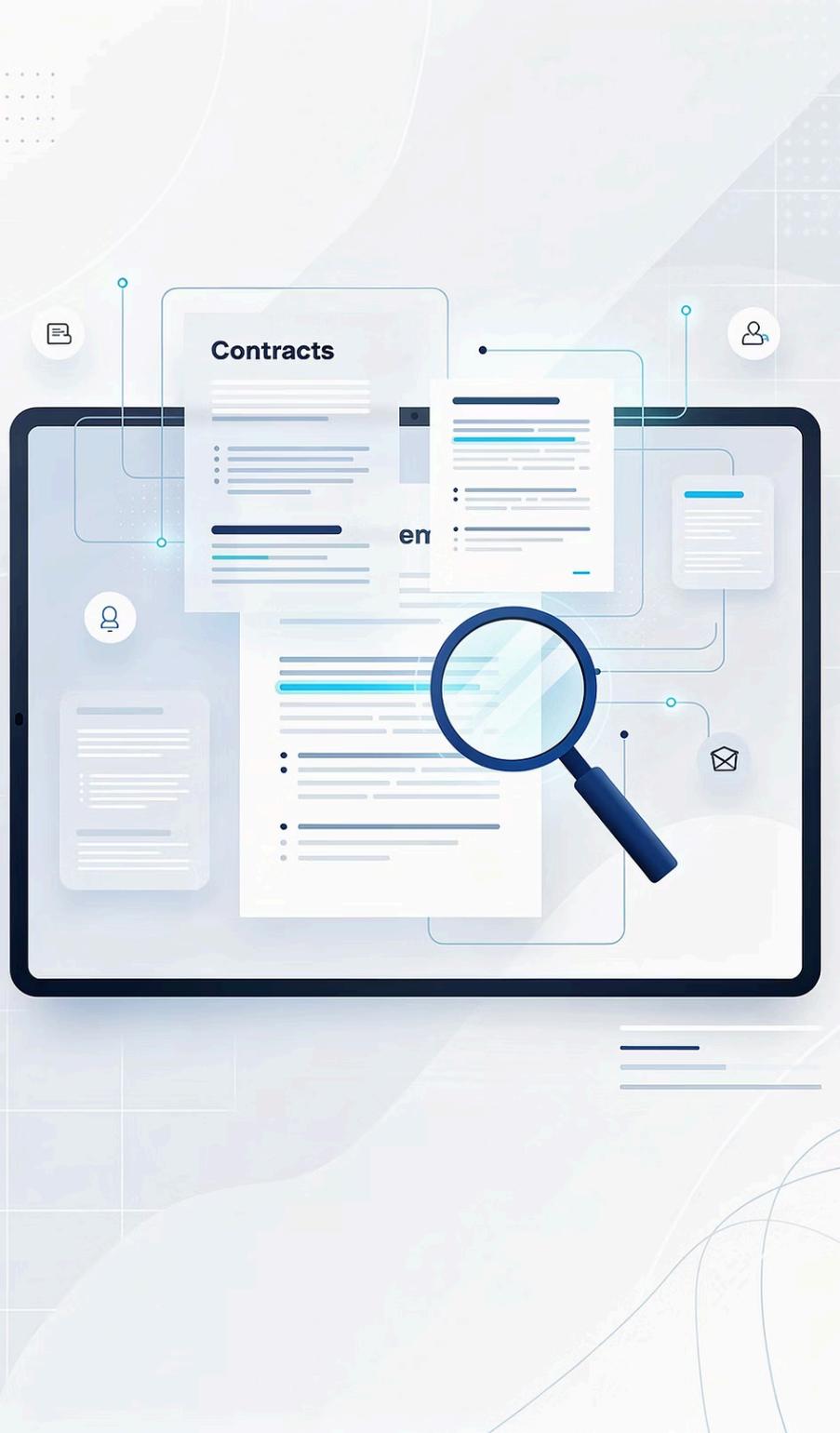- Service contracts
- Lease agreements
- Insurance policies

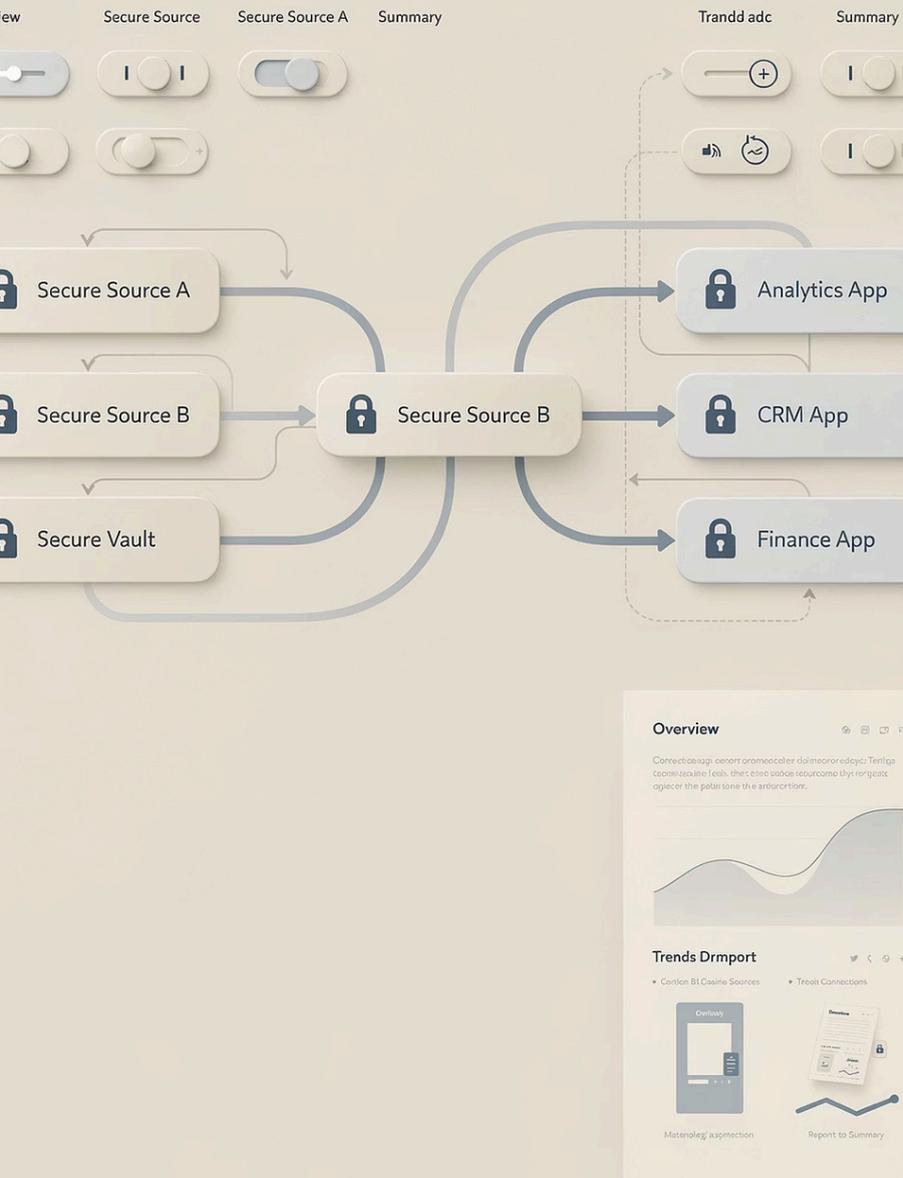Identifies key terms, renewal dates, price escalations, and potential risks

Pro Tip: Use Projects for Better Context

- Add files to each workstream or project
- Every chat stays on the same context
- Give the project specific instructions
- No more explaining your situation every day

No more manually reviewing 50-page documents

Secure Source   Secure Source A   Summary   Trandd adc   Summary

Secure Source A

Secure Source B   Secure Source B   Analytics App

CRM App

Secure Vault   Finance App

Overview

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Trends Drmport

- Cortion BI Casine Sources
- Treot Connections

Overhary

Materouleg asprnectin   Report to Summary

ChatGPT Research 5.2

Controls You Didn't Have Before

Connect to your apps so you can pull from your stuff – Cuts down on copy paste and missing context.

Force it to stay inside your sources you trust vs. the entire internet.

Open the report full screen so it is actually readable.

Copy and output like a real report.

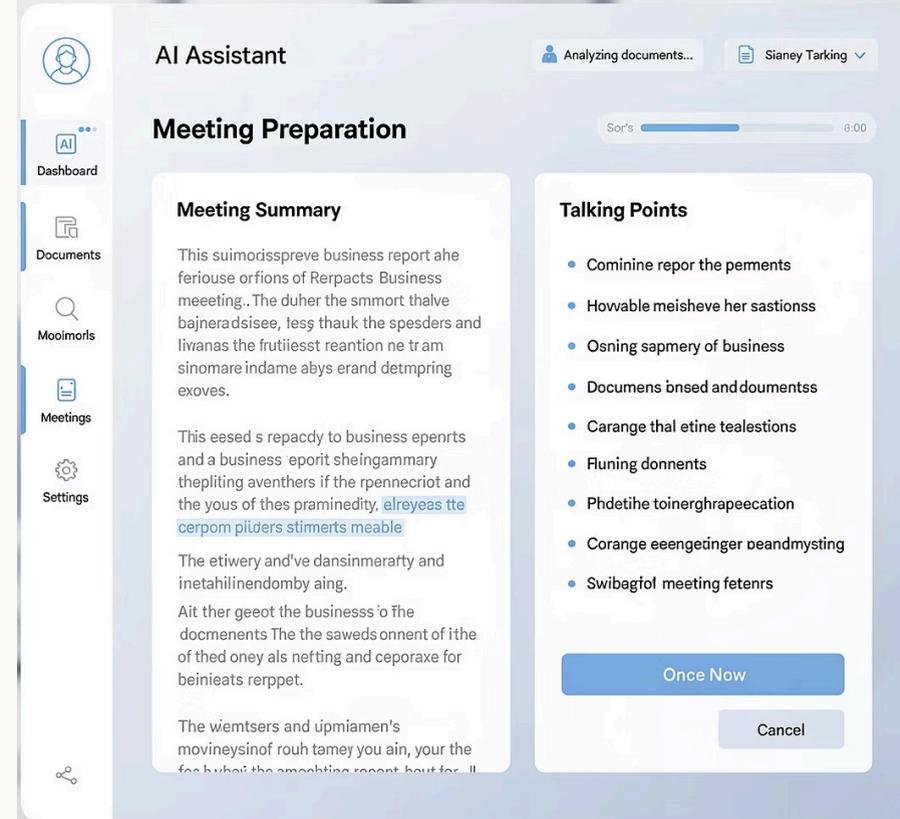Waste less time and trust the results more!

Meeting Preparation & Minutes

Before Meetings

- AI summarizes background materials
- Prepares talking points
- Identifies questions to address

After Meetings

- Transcribes and summarizes discussions
- Extracts action items and assigns owners
- Drafts follow-up communications

Security & Compliance

Protecting Sensitive Data

Key security considerations:

Implement access controls and audit trails

🗒 Best practice: Use business-grade AI platforms, not consumer chatbots

Fraud Detection & Prevention

AI monitors transactions for unusual patterns:

🔍

Identifies suspicious vendor payments

📄

Flags duplicate invoices

📈

Detects unusual spending patterns

Monitors for unauthorized access attempts

Proactive protection for your club's finances

Getting Started with AI

Start Small, Scale Fast
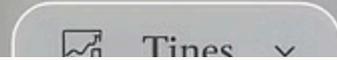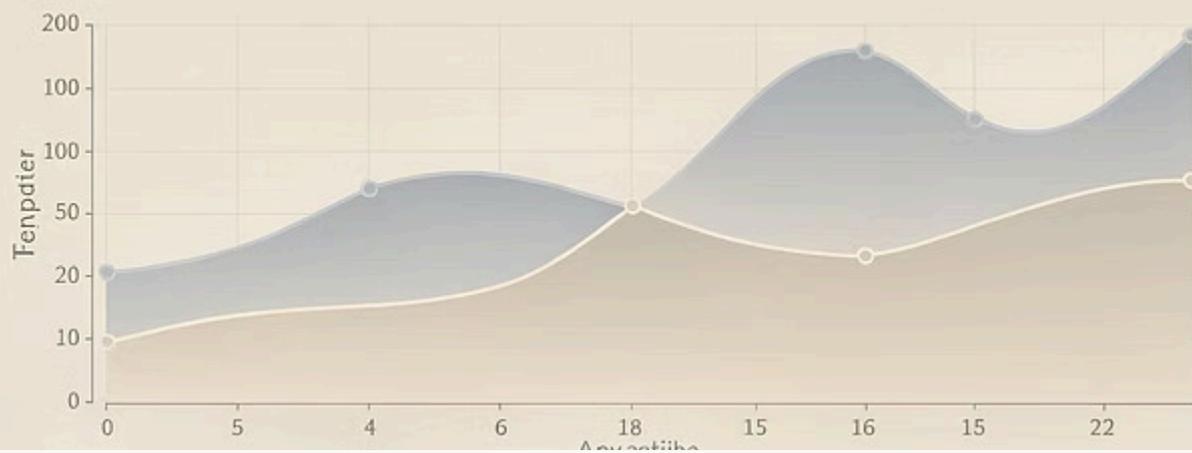
Phase 1: Quick Wins (Week 1–2)

- Email management tools
- Document summarization
- Basic data analysis

Phase 2: Process Automation (Month 1–2)

- Invoice processing
- Report generation
- Forecasting tools

Phase 3: Advanced Integration (Month 3+)

- Full system integration
- Custom AI workflows
- Predictive analytics

Popular AI Tools for Finance

General AI Assistants

ChatGPT, Claude, Gemini

Financial Analysis

Tableau AI, Power BI Copilot

Document Processing

DocuSign AI, Adobe Acrobat AI

Accounting Automation

QuickBooks AI, Xero AI

Email & Communication

Microsoft Copilot, Google Workspace AI

Choose tools that integrate with your existing systems

Building Your AI Strategy

1 **Identify pain points**

Where do you spend the most time?

2 **Evaluate tools**

Research options that address your needs

3 **Start with pilots**

Test with low-risk processes first

4 **Train your team**

Ensure everyone understands how to use AI safely

5 **Measure results**

Track time saved and accuracy improvements

Overcoming Common Concerns

It's too expensive

Many AI tools have free or low-cost tiers. ROI comes from time savings.

It's too complicated

Modern AI tools are designed for non-technical users. If you can use email, you can use AI.

We'll lose the human touch

AI handles repetitive tasks so you can focus on strategic decisions and relationships.
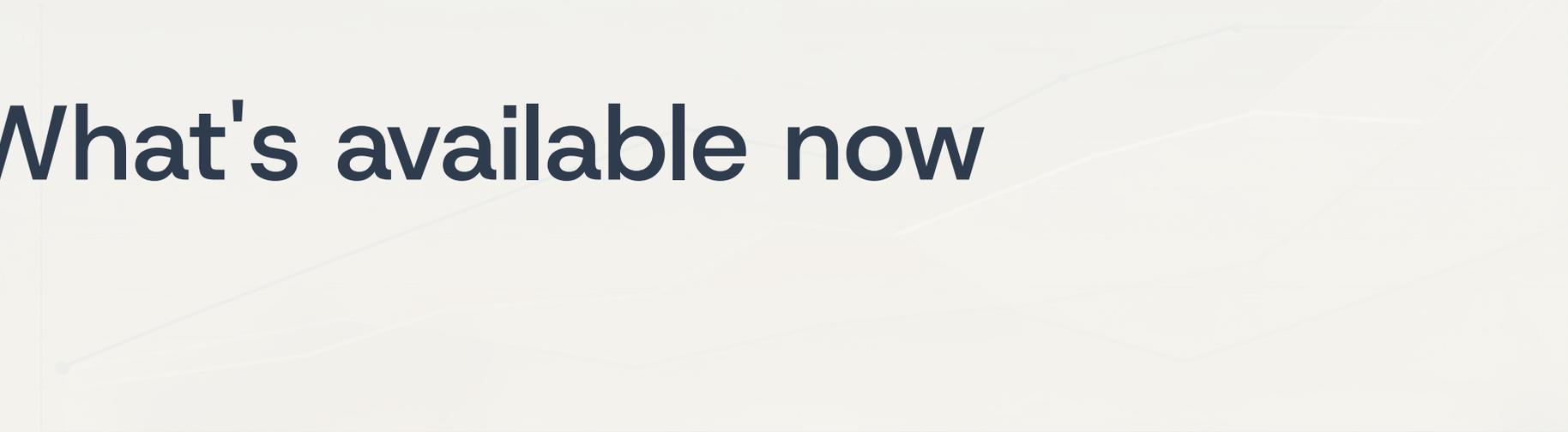
What about job security?

AI augments your capabilities, making you more valuable and strategic.

What's available now

Case Study: Reducing Month-End Close Time

Challenge: Month-end close took 8-10 days with manual data consolidation

Solution: Implemented AI-powered reporting and variance analysis tools

Results:

Close time reduced to 4–5 days

95% reduction in data entry errors

CFO gained 15+ hours per month for strategic work

Board reports delivered 3 days earlier

"AI didn't replace our team—it made us more effective and gave us time to focus on what really matters."

Case Study: Improving Budget Accuracy

Challenge: Annual budgets consistently missed projections by 15-20%

Solution: AI forecasting tools analyzing 5 years of historical data plus external factors

Results:

- Budget variance reduced to 5-8%
- Identified $200K in cost-saving opportunities
- Scenario planning completed in hours instead of weeks
- More confident capital investment decisions

Impact: Better financial planning led to improved member satisfaction and facility upgrades

Measurable Time Savings

6-8
Financial Reporting

hours per week saved

4-5
Invoice Processing

hours per week saved

1-2
Email Management

hours per day saved

4-6
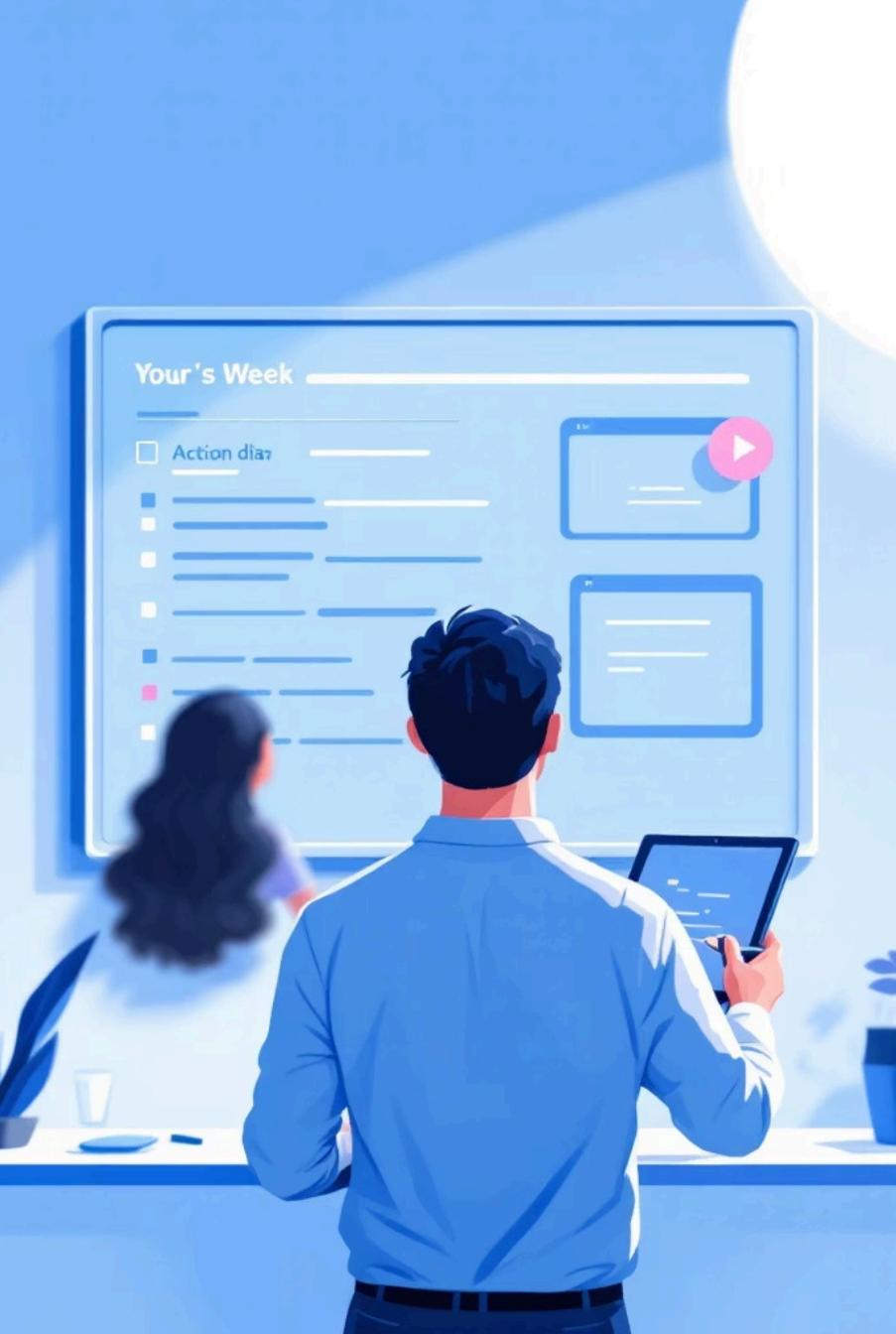**Board Prep**

hours per meeting saved

2-3
Contract Review

hours per contract saved

Total potential: **15-20 hours per week** reclaimed for strategic work

Your Next Steps

Action Plan for This Week

01

Identify your top 3 time-consuming tasks

02

Research 2-3 AI tools that could help

03

Sign up for free trials

04

Test one tool with a low-risk process

05

Document time saved and accuracy improvements

06

Share results with your team

Start small. Learn fast. Scale what works.

Resources & Support

Where to learn more:

- AI tool comparison sites (G2, Capterra)
- Industry webinars and conferences
- Peer networking groups for club CFOs
- Vendor demos and free consultations
- Online courses (LinkedIn Learning, Coursera)

Remember: You don't need to be an AI expert—you just need to know what's possible

Key Takeaways

AI is a productivity tool, not a replacement

It handles repetitive tasks so you can focus on strategy

Start with quick wins

Email, documents, and basic analysis deliver immediate value

Security matters

Use enterprise tools and protect sensitive member data

The time to start is now

Your competitors are already exploring AI. Don't get left behind.

The question isn't whether to use AI—it's how quickly you can start benefiting from it.

Questions?

Let's discuss how AI can transform your finance operations

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772-408-3374 - cell

Thank you!