

AI That Does Your Work

Not AI literacy and not a demo. A half day in which each person takes one recurring piece of their own work, a reconciliation, a lead sheet, a forecast tab, a report pack, a vendor tracker, and turns it into a process that runs the same way every time: input, transformation, output, human check. We teach on a shared practice dataset so the room stays together, then each person applies it to their own file. By the end, every table has ranked its recurring processes by hours, frequency, and how rule-bound they are, and picked the first two. Runs on Claude or Copilot, whichever your organization allows; the pattern is what you keep when the tools change.

This is instructor-led, hands-on training. Trainees have access to a qualified instructor for the full duration, in the room or live online, and for questions by email for thirty days after.

LEARNING OUTCOMES

- One of your own recurring processes running through the tool, with a one-page process card: input, what I do to it, output, who checks it, how often, how long.
- The trust model in plain terms: what these systems are and are not, why the ERP stays and the spreadsheet layer shrinks, and what never goes in.
- A first-pass sub-ledger to GL reconciliation, or a lead-sheet flux commentary, or a forecast workbook refresh, done on practice data and then on yours.
- A ranked roadmap of the team's recurring processes, with the first two chosen and an owner for each, in the sponsor's hands before the room empties.

OUTLINE · 2.5 HOURS (150 MINUTES OF INSTRUCTION)

1. 20 min **What this is, and what it is not**
 - What these systems do reliably and where they guess. The ERP stays; the spreadsheet layer shrinks.
 - The pattern: input, transformation, output, human check. Deterministic where it must be, AI where it helps.
 - The data question, answered from the guide we sent ahead.
2. 30 min **One process, together, on practice data**
 - The AP sub-ledger to GL reconciliation: the tie stays in the query, the tool drafts the timing-versus-error explanations and the approval email.
 - Writing the process card that becomes the instruction.
 - The ten-second check that catches a wrong number.

3. 50 min

Your process, on your file

- Each person builds their own card and runs it: lead sheet commentary, forecast tab, report pack, vendor expiry tracker, close checklist.
- Pairs swap: you run your neighbour's process on their data. If a second person can reproduce it, it is a process.
- Six starter tasks on the shared data for anyone who brought nothing.

4. 20 min

The control layer

- What never goes in, and how you tell.
- Who approves, where the log lives, and how you would defend the output to an auditor.
- The harvest: one that worked, one that half-worked, one that was the wrong job for AI.

5. 30 min

The roadmap

- Each table lists its recurring processes and ranks them by hours, frequency, and how rule-bound they are.
- Pick two. Name an owner. First ones should be high volume, rule-bound, and something the auditor will not ask about.
- The sponsor leaves with the company's list.

AUDIENCE AND PREREQUISITES

Finance and operations staff: accounting, FP&A, AP and AR, finance systems, and the ops, HR, and procurement teams around them.

- A laptop and a Claude or Copilot login your organization allows for work. Setup instructions come ahead of the course.
- One recurring task and one file it uses. A sanitized or practice version is fine.

DELIVERY, COST, AND PROVIDER DETAILS

DATES AND TIMES

One session of 2.5 hours. Start and end date and time are set with the employer at booking and shown on the quote.

NUMBER OF PARTICIPANTS

Minimum 10, maximum 20 per session.

TRAVEL

None.

INSTRUCTOR

Neil Perejma, Founder, 1113 Technologies

- Founder, 1113 Technologies Inc.; Principal, EPM ONE Consulting Ltd. (incorporated 2016)
- 20+ years delivering Oracle EPM Cloud and Hyperion finance systems, including hands-on training for every implementation
- Daily practitioner of Claude, Claude Cowork, and Claude Code for finance-systems automation since 2024

DELIVERY METHOD

In-class at the employer’s premises in Calgary, or virtual (live, instructor-led) on Zoom or Microsoft Teams.

COST PER PARTICIPANT

\$450 CAD. Session total \$4,500 CAD for up to 20 participants (minimum 10 billed). GST extra.

TRAINING CATEGORY

Business Process and Operations Management (corporate finance and accounting); Digital and Technological (digital tools)

TRAINING PROVIDER

1113 Technologies Inc.
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ON COMPLETION

Each trainee receives a certificate of completion by name. The employer receives a paid invoice showing cost and payment date, and a letter confirming trainees and completion by name, the business day after the session. Trainee personal information for the grant application is submitted by the employer to the Alberta portal directly; 1113 Technologies does not collect it. Grant engagements are delivered and invoiced by EPM ONE Consulting Ltd.