How to level up with AI

A question-driven approach to help you turn casual AI use into more consistent time savings and higher-quality work.

The Leveling Up with AI workbook, written in collaboration with Donny Shimamoto, CPA, CITP, CGMA, founder and managing director, IntrapriseTechKnowlogies, is a short, structured reflection and planning tool designed for any role. It helps you (1) identify where AI already touches your work, (2) measure whether those uses are truly helping, and (3) identify workflows to improve in a way that is repeatable and safe. Think of it as a bridge between experimenting and operating—less novelty, more consistent results.

AI is already showing up in everyday work—drafting and rewriting emails, summarizing long threads, turning notes into a first draft, or brainstorming options when you're stuck. The problem is that using AI is not the same thing as getting value from AI. Without a structured approach, it's easy to spend time prompting, then spend even more time validating, correcting, and worrying about what's safe to share.

Key learnings

- **Get clarity** on where AI fits in your week, and where it doesn't.
- **Spot net value fast** through time saved vs. time spent validating and fixing.
- **Identify high-impact workflow** to standardize your next experiment.
- **Add personal guardrails** for accuracy, confidentiality, and judgment-heavy work.
- **Share a focus plan** of 60- to 90-days with your manager/team.

KEY IDEA

Optimize for value, not speed

AI often makes the first draft faster. In professional work however, the real metric is net value—making sure the time saved is greater than the time spent on validation and risk. A polished but inaccurate draft can be costly if you miss an error. You need clarity and control more than speed.

The workbook's questions are designed to surface that tradeoff early. You can then focus on improving the parts that drive better ROI: clearer inputs, better prompts, and a consistent human review step. It also helps you diagnose common failure modes, such as:

Hidden rework	Rewriting takes longer because the AI misses initial context.
Overconfidence	AI output sounds authoritative even when it's incomplete or incorrect.
Shallow summaries	The output is a simple recap, missing the specific decisions, action items, and next steps that drive real progress.
Policy uncertainty	You avoid AI because you're unsure what data is safe to share—or you take risks accidentally.
Random experimentation	Time is wasted on random prompts without building a consistent, documented workflow.

Who it's for

This is for anyone whose job involves writing, reviewing, analyzing, summarizing, explaining, or coordinating work. No technology background required. If you've tried AI and thought, "This is promising, but I'm not sure I trust it (or I'm not sure it's worth the time)," this workbook is for you.

How it works

The workbook follows a simple pattern: baseline → assess → guardrails → action plan. You start by naming where you use AI today, or where you avoid it, then run a quick performance scan on your most common use cases. That scan is deliberately practical. It asks about time saved, quality, confidence, and the time you spend validating, so you can see which workflows make sense to automate.

Next, you identify high-impact workflow(s), such as redesigning a bill payment process, to refine processes and build reliable, repeatable processes. You'll also design one safe experiment to give you real experience with these tools.

Finally, you define guardrails—what data to avoid in your AI tools, your non-negotiable human review step, and who to ask for clarity. The last page turns your plan into a focused conversation starter for your manager on what you're improving and what success looks like in the next 60 to 90 days.

Get started today

Pick one recurring task
Ideas include email responses, meeting follow-ups, summarizing documents, drafting client communications.

Estimate time to first draft and time to validate
If you don't use AI, estimate how long it takes today. This is your baseline for evaluating the potential time savings.

Write down your current process
Specify the tasks you're working on, what "done" looks like, and where errors would hurt.

Choose one improvement target area
Ideas beyond saving time include faster turnaround, clearer writing, fewer omissions, better tone, or a shorter validation checklist.

Go deeper

Follow the thought process in the workbook to create an action plan to "level up" your use of AI. If you want a guided walkthrough and practical examples, join our webinar on Leveling Up with AI. We'll talk you through the workbook—so your next 60–90 days of AI use can lead to measurable improvement.

About the author

Donny C. Shimamoto, CPA, CITP, CGMA, is the founder and managing director of IntrapriseTechKnowlogies LLC, an advisory-focused CPA firm providing innovation acceleration and business transformation services for small businesses, middle market organizations, and nonprofits. Donny is an internationally recognized thought leader and advisor in the accounting technology, IT risk management, and performance management areas. His dedication to helping accountants and organizations strategically leverage technology while proactively managing their business and technical risk is paramount.

Donny is also the Inspiration Architect for the Center for Accounting Transformation. The Center is a mind trust of innovative thinkers and experts who help enable transformation by guiding accountants, auditors, and tax practitioners through the adoption and changes required in order to step into the future of the accounting profession.

Worksheet

Personal calibration and focus

Use this worksheet to take stock of how you're already using AI, assess what's truly working, and gain clarity on where to focus your efforts for the next 60–90 days. It's designed for any role in the firm.

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Section 1

Personal AI enablement assessment

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For each line, indicate your agreement with the statement by selecting a number from 1 to 5.

1 = strongly disagree
2 = disagree
3 = neutral
4 = agree
5 = strongly agree

Digital fluency

Embracing new technologies starts with nurturing confidence and curiosity as you learn and experiment. You can build this by (1) strengthening your digital fluency and, (2) creating a safe space to explore and try things out.

_____ I spend a lot of time reading/learning about technology.

_____ My base understanding of technology is strong.

_____ Learning to use technology comes naturally for me.

_____ I'm comfortable experimenting with new technology.

_____ I often volunteer when my workplace asks for help doing a pilot technology we want to try.

_____ My coworkers/peers often come to me for technology help/advice.

_____ I'm an IT professional or an equivalent IT cross/hybrid in my discipline.

Personal agility and curiosity

Because AI's capabilities continue to evolve regularly, becoming and staying proficient in it requires that you continuously update your understanding and skillset. Some people prefer to be the frontrunner with new technology, others prefer to wait and adopt once all the bugs are worked out.

_____ I've invested a lot of my own time to learn how to use AI.

_____ I've invested in classes to learn to use AI.

_____ I'm willing to keep iterating on my AI to refine my skills.

_____ I prefer to learn to use AI after the best practices have been figured out and codified.

_____ I prefer to have other people use AI for me.

For each line, indicate your agreement with the statement by selecting a number from 1 to 5.

1 = strongly disagree
2 = disagree
3 = neutral
4 = agree
5 = strongly agree

Workplace change adoption and impact

Different organizations have varying opinions on AI. When an organization includes a strategic imperative for AI (e.g. "AI-first") this sets the tone for how work is approached. But that top-down directive must be supplemented with content and learning to drive adoption. It's often said that AI won't replace workers, but the AI-augmented worker will outlast those that don't use AI.

_____ I understand why my workplace is exploring or using AI.

_____ Using AI is an integral part of my workplace's business strategy.

_____ My workplace has provided AI training for my team/department.

_____ My workplace has provided AI tools for my team/department.

_____ I see a high potential for use of AI in my area of work.

_____ My team/department has adopted AI extensively.

_____ I think AI can fully replace me or my peers at work.

_____ I think AI can fully replace some of my subordinates at work.

_____ I think AI can fully replace some of my supervisors at work.

Learning midflight

Adoption and use of any technology at work requires time invested at work for learning, while still balancing your day-to-day work. Some organizations provide time for unstructured learning (e.g. experimentation), formal supervised learning (e.g. courses/webinars), and formal unsupervised learning (e.g. self-study); others expect you to just learn on-the-job or on your own time.

_____ My organization gives us time to learn (all areas, not just AI) while working.

_____ I set aside time at work for learning (all areas, not just AI) every week.

_____ It's realistic for me to incorporate time for learning AI into my weekly work schedule.

_____ I set aside time annually to attend technology training at work.

_____ My organization provides self-study materials/courses for technology (not just AI).

_____ My organization provides self-study materials/courses for AI.

_____ My organization provides courses/webinars for technology (not just AI).

_____ My organization provides courses/webinars for AI.

Section 2

Where AI already shows up in my week

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Check all that apply.

How I'm using AI at work today

- [ ] Basic augmentation
- [ ] Drafting or refining emails, memos/internal notes, or documents
- [ ] Summarizing emails, meeting notes, or long documents
- [ ] Using AI built into existing business apps for transaction processing (e.g., AP/AR coding, expense reports)

Intermediate knowledge work

- [ ] Categorizing or organizing structured data (transactions, GL details, spreadsheets)
- [ ] Doing research or synthesizing guidance (rules, best practices, checklists)
- [ ] Brainstorming (ideas, outlines, edge cases)
- [ ] Explaining complex topics in plain language (for clients or colleagues)

Intermediate analytical work

- [ ] Predictive analytics or forecasting
- [ ] Anomaly or outlier detection
- [ ] Automated decision-making or transaction triage

Intermediate automation work

- [ ] Creating my own LLMs/knowledge-based agents without programming
- [ ] Vibe coding my own business apps
- [ ] Checking the quality of software/apps

Other: _____

Quick performance scan

Pick one of the AI uses you checked on page 6 that you do most often, then jot down a few notes below.

Use #1

What I use AI for:

Approximate time saved vs. doing it manually:

- ☐ Low (0–10%)
- ☐ Medium (10–30%)
- ☐ High (30%+)

Initial quality of output compared to my usual work:

- ☐ Worse
- ☐ Good-enough
- ☐ Same
- ☐ Better

My initial confidence in accuracy/completeness:

- ☐ 1 (very low)
- ☐ 2 (low)
- ☐ 3 (moderate)
- ☐ 4 (high)
- ☐ 5 (very high)

Amount of time I spend to validate the results:

- ☐ None
- ☐ Low (<1 hour or up to 10% of allotted task time)
- ☐ Medium (1-3 hours or up to 30% of allotted task time)
- ☐ High (3+ hours or more than 30% of allotted task time)

What works well?

What feels risky or clunky?

Quick performance scan

Pick one of the AI uses you checked on page 6 that you do most often, then jot down a few notes below.

Use #2

What I use AI for:

_____

Approximate time saved vs. doing it manually:

- ☐ Low (0–10%)
- ☐ Medium (10–30%)
- ☐ High (30%+)

Initial quality of output compared to my usual work:

- ☐ Worse
- ☐ Good-enough
- ☐ Same
- ☐ Better

My initial confidence in accuracy/completeness:

- ☐ 1 (very low)
- ☐ 2 (low)
- ☐ 3 (moderate)
- ☐ 4 (high)
- ☐ 5 (very high)

Amount of time I spend to validate the results:

- ☐ None
- ☐ Low (<1 hour or up to 10% of allotted task time)
- ☐ Medium (1-3 hours or up to 30% of allotted task time)
- ☐ High (3+ hours or more than 30% of allotted task time)

What works well?

_____

What feels risky or clunky?

_____

Quick performance scan

Pick one of the AI uses you checked on page 6 that you do most often, then jot down a few notes below.

Use #3

What I use AI for:

_____

Approximate time saved vs. doing it manually:

- ☐ Low (0–10%)
- ☐ Medium (10–30%)
- ☐ High (30%+)

Initial quality of output compared to my usual work:

- ☐ Worse
- ☐ Good-enough
- ☐ Same
- ☐ Better

My initial confidence in accuracy/completeness:

- ☐ 1 (very low)
- ☐ 2 (low)
- ☐ 3 (moderate)
- ☐ 4 (high)
- ☐ 5 (very high)

Amount of time I spend to validate the results:

- ☐ None
- ☐ Low (<1 hour or up to 10% of allotted task time)
- ☐ Medium (1-3 hours or up to 30% of allotted task time)
- ☐ High (3+ hours or more than 30% of allotted task time)

What works well?

_____

What feels risky or clunky?

_____

Quick performance scan

Pick one of the AI uses you checked on page 6 that you do most often, then jot down a few notes below.

Use #4

What I use AI for:

Approximate time saved vs. doing it manually:

- [ ] Low (0–10%)
- [ ] Medium (10–30%)
- [ ] High (30%+)

Initial quality of output compared to my usual work:

- [ ] Worse
- [ ] Good-enough
- [ ] Same
- [ ] Better

My initial confidence in accuracy/completeness:

- [ ] 1 (very low)
- [ ] 2 (low)
- [ ] 3 (moderate)
- [ ] 4 (high)
- [ ] 5 (very high)

Amount of time I spend to validate the results:

- [ ] None
- [ ] Low (<1 hour or up to 10% of allotted task time)
- [ ] Medium (1-3 hours or up to 30% of allotted task time)
- [ ] High (3+ hours or more than 30% of allotted task time)

What works well?

What feels risky or clunky?

Prompt

Write one durable AI skill you'd like to improve in the next 60–90 days.

The durable skill I'll focus on is:

Section 3

Where to go deeper

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1. My highest-impact AI use today

Look back at your uses from **Section 2**. Choose the one that feels most important to improve because it (check the boxes for which points apply):

Impacts clients/client service

- ☐ Is repetitious and takes a lot of your time
- ☐ Affects the quality of work
- ☐ Presents risk to your team or organization.

2. One new, safe experiment

Now think about adjacent tasks where AI might help but you're not using it yet.

Examples:
Turning review notes into staff feedback notes for a performance review, turning messy client emails into summaries and action items lists, using AI as a coach to help you practice discussing an issue with a client.

A new, relatively safe task I could try AI on is:

_____

What "success" would look like for this experiment (be specific):

_____

Section 4

My 60–90 day AI focus

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Check all that apply.

My realistic time investment

Given everything on my plate, I can realistically commit to:

- [ ] 10–15 minutes a day (micro-experiments)
- [ ] 30–60 minutes once a week (micro “AI lab” time)
- [ ] 2–3 hours a month (focused “AI lab” time)
- [ ] A 20–40 hour project (deeper re-design of a workflow)

Other:

_____

What I’ll actually do with that time

Check 1–3 actions that fit your reality. Keep in mind the use cases you identified from **Section 3**.

- [ ] Create or tighten up a prompt and steps for my highest-impact AI use case
- [ ] Design and run the new experiment I identified (with 2–3 test runs)
- [ ] Create a simple checklist for how I review AI outputs for a workflow
- [ ] Capture one “before and after” example and evaluate the benefits
- [ ] Share one AI tip or workflow with a colleague or my team

If helpful, add your own:

_____

Section 5

Safety, accuracy, and fit

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Safety, accuracy, and fit

Some people are uncomfortable using AI due to the risk of hallucinations and lack of transparency. However, those who have worked with it enough to refine prompts or who have strong validation processes for output become very comfortable in their skills. In the following sections, be transparent in your answers. There is no right or wrong answer.

1. How comfortable are you with using AI in the following areas?

1 = very worried
2 = worried
3 = neutral
4 = comfortable
5 = very comfortable

_____ Client-facing communication

_____ Work product for clients

_____ Communication with coworkers

_____ Work product for internal use

_____ Work involving numbers and calculations

_____ Work involving research and knowledge summarization

_____ Judgment-heavy analyses or recommendations

_____ Working with sensitive or confidential data

_____ Working with private data (i.e. PII)

2. My personal guardrails

Complete the prompts below:

A new, relatively safe task I could try AI on is:

_____

For my highest-impact AI use, my non-negotiable human review step is (e.g., reconcile numbers, rewrite in my own words, cross-check against source docs):

_____

Who I'll ask about AI policy/risks if I'm unsure (name or role):

_____

Section 6

Conversation starter with my firm

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Safety, accuracy, and fit

In the next 60–90 days, I plan to:

Upgrade this existing AI workflow:

_____

Run this new, safe experiment:

_____

Focus on this durable skill:

_____

Support or clarity I'd like from my manager/firm (policies, tools, training, examples):

_____

_____

_____

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