

Accountant

FINANCE · O*NET 13-2011.00 · ACCOUNTANTS AND AUDITORS

CLOSE FASTER, WRITE THE NARRATIVE QUICKER, KEEP THE AUDIT TRAIL CLEAN.

1 YOUR ROLE TODAY

Accountants keep the books right and explain what they mean. The professional judgement, the sign-off and the duty of care stay with you. The reconciling, drafting and document-reading are where time leaks — and where AI helps most, with a human check on every figure.

WHAT THE JOB INVOLVES

- Prepare and examine financial records for accuracy and compliance.
- Reconcile accounts and resolve discrepancies.
- Prepare statements, returns and management reports.
- Analyse costs, revenues and financial commitments.
- Advise on financial controls and process improvements.
- Support audits with documentation and explanations.

SKILLS THAT MATTER MOST

- Mathematics
- Reading comprehension
- Active listening
- Critical thinking
- Writing
- Time management

O*NET job zone: Job Zone 4 — considerable preparation.

2 THE FOUR COPILOT TOOLS

COPILOT CHAT	Free, secure chat. Works from the open web and anything you paste or upload. No access to your internal files unless you give it.
M365 COPILOT	Sits inside Word, Excel, PowerPoint, Outlook and Teams. Works on your own emails, files and meetings (only what you already have permission to see).
COPILOT COWORK	You hand over a longer job and it works through the steps, showing progress so you can steer. Good for multi-stage work that used to eat an afternoon.
COPILOT AGENTS	A custom helper you (or IT) set up once to handle a specific, repeatable job — answering a common question, triaging a queue, drafting from a template.

3 AI OPPORTUNITY MAP

Where the four tools fit the real work — with a practical example for each.

TASK	BEST TOOL	PRACTICAL EXAMPLE
Draft management commentary for the month-end pack	M365 COPILOT	Turn the variance numbers into a clear narrative in Word, then check and sign.
Explain or build an Excel formula	M365 COPILOT	Ask Copilot to write a reconciliation formula or explain a workbook you inherited.
Read a new standard or guidance note	COPILOT CHAT	Get a plain-English summary, then confirm against the source text.
Pull the close pack together	COPILOT COWORK	Delegate the routine assembly: gather schedules, draft commentary, flag the items needing judgement.
Answer recurring finance queries from the business	COPILOT AGENTS	An agent that answers 'how do I code this' from your own policy, escalating the unusual.
Draft a reply to an auditor's question	M365 COPILOT	Draft the response from your working papers; you confirm the facts.

4 SKILLS TO BUILD

The AI-literacy habits this role needs.

- Tracing every AI-touched number back to source before it goes out.
- Writing the narrative brief so the draft matches the figures.
- Spotting plausible-but-wrong output — the riskiest kind in finance.
- Keeping confidential data on the right surface.

5 GETTING STARTED — 3 QUICK WINS THIS WEEK

- ✓ Draft this month's management commentary in Copilot, then verify every figure.
- ✓ Ask Copilot in Excel to explain a reconciliation you didn't build.
- ✓ Summarise one guidance note you've been meaning to read.

6 GETTING AHEAD — YOUR 90-DAY PLAN

Days 1–30 · Get started	Use Copilot in Excel and Word for formulas and commentary. Summarise standards and long emails before acting.
Days 31–60 · Build the habit	Delegate the routine close assembly to Cowork. Keep a verification checklist for anything AI helped produce.
Days 61–90 · Get ahead	Set up an agent for repeated coding/policy queries from the business. Measure days saved at close.

7 WHERE TO LEARN NEXT

Four short intro courses, in order. Start at the top.

- 01** Start with Copilot Chat
The no-risk way in. Ask, draft, summarise, compare. One hour.

02 Work inside M365 Copilot
Use it in the apps you already live in: Outlook, Word, Excel, Teams.

03 Delegate with Copilot Cowork
Hand over the multi-step jobs. Learn to brief, check and steer.

04 Build a Copilot Agent
Turn your most repeated task into a helper that runs itself.

Sources — Occupation overview: O*NET 30.2, occupation 13-2011.00 (oneline.org/link/summary/13-2011.00) and the ESCO occupational profile (esco.ec.europa.eu). Copilot tool descriptions: Microsoft 365 Copilot and Copilot Cowork product documentation, Microsoft, May 2026. AI mapping and pathways: Craig Stanley Studio. Verify figures and policy against your own systems before acting.

