

Claude at the Desk

Three hours. One bookkeeping or tax team. Their real files, redacted. Eight artifacts. One send under review this week.

Fieldstone Advisory

Montgomery County, Texas · Founding edition · \$1,500 · September 2026

AI drafts. Human review. Then send. We are not a CPA firm. We are not a law firm. Circular 230 did not get an AI exception.

HOW TO RUN THE ROOM

House rules stay on the wall

01 · No live SSNs, EINs, bank numbers, or full legal names in the model. Redact first.

02 · Consumer chatbots stay off live files. Team seats only.

03 · A draft is not a return. Circular 230 did not get an AI exception.

04 · The red-pen ritual is required before anything leaves the room: facts, cites, numbers, tone, PII, would I sign.

05 · Nothing emails itself. The human who signs owns it.

06 · Each person names one artifact they will take home live. That is the close of the day.

SAMPLE FILE

Twelve Oaks GC (de-identified)

General contractor · Conroe, Texas · Twelve in the field

QBO eight months behind. Progress billing and retainage. Jobs never tagged. Owner still prices from last year's gut. 2025 extension still open.

Do not invent an EIN, a bank, a legal name, or a fee.

TIMED AGENDA

Three hours, including two breaks

0:00 · 15 MIN

Open the file

Outcomes, house rules, tool check, redaction drill. Each person names the one artifact they will take home live.

Facilitator: Write the eight artifacts on the board. Collect the one-artifact promise before the first demo. Tool check: Team seats open, sample file loaded, no live client on screen.

0:15 · 20 MIN

What 2026 actually looks like

98% of firms already use AI. Most still paste. Claude Skills vs QBO Assist vs a vertical. Jobs it can draft vs jobs it cannot.

Facilitator: Stay on the five-layer stack. Do not demo a vertical you do not run. If someone wants ChatGPT vs Claude, the answer is the desk and the policy, not the logo.

0:35 · 20 MIN

The rule that lets you sleep

Circular 230 — no AI exception. 1.700, 7216, WISP. The red-pen ritual: facts, cites, numbers, tone, PII, would I sign.

Facilitator: Leave the red-pen on the wall. Read OPR Alert 2026-19 in one sentence: the practitioner who signs owns it. No war stories that name a client.

0:55 · 10 MIN

Break

Leave the policy slide up. No live SSNs.

Facilitator: Policy slide stays up. Check that no one photographed a live SSN.

1:05 · 15 MIN

Live demo

One cold contractor note and one not-a-fit decline, start to approved. Nothing emails itself.

Facilitator: Cold note first, decline second. Narrate the red-pen out loud. Seven minutes, then stop — even if it is ugly.

1:20 · 40 MIN

Hands-on A — fill the calendar

Exercises 1–4. Eight minutes produce, two minutes pair-redline.

Facilitator: Exercises 1–4. Eight minutes produce, two minutes pair. You walk; you do not type for them.

2:00 · 10 MIN

Break

Coffee. The sample file stays de-identified.

Facilitator: Sample file stays de-identified. No ‘quick look at my real client.’

2:10 · 40 MIN

Hands-on B — do the work

Cleanup plan, Friday snapshot, Texas calendar, 1040 organizer.

Facilitator: Exercises 5–8. Same cadence. Snapshot and calendar are the keepers.

2:50 · 10 MIN

Install

Seven-day plan. One live artifact under review tomorrow. Founding firm: the testimonial ask.

Facilitator: Each person says the artifact, the owner, the send-by date. Founding firm: testimonial in 14 days, four to six sentences, no superlatives required.

Fifteen slides. Not a deck for the client.

01

AI drafts. Human review. Then send.

The whole workshop in eight words.

02

Outcomes for the next 90 days

Eight artifacts today. Two you will send this week under review.

03

98% already use it. Most still paste.

Daily use is solved. A desk and a policy are not.

04

The five-layer stack

Ledgers, QBO AI, AP, close tools, then LLMs. We are here.

05

What Claude is for

Narrative, exception research, cleanup plans, first-look reviews.

06

What Claude is not

Posting to the GL, remembering 15 clients, signing the return.

07

The four-stage desk

Source, screen, onboard, implement.

08

Circular 230 did not get an AI exception

OPR Alert 2026-19. The practitioner who signs owns it.

09

The red-pen ritual

Facts, citations, numbers, tone, PII, would I sign this.

10

Demo: cold note, seven minutes

Prompt → draft → redline → approved.

11

Hands-on A

Outreach, discovery, decline, documents.

12

Hands-on B

Cleanup, snapshot, calendar, organizer.

13

Catch the hallucination

Invented cites and invented dates are a known failure mode.

14

The 7-day install

Team seats, 7216 clause, two Skills, one live send.

15

Close

One artifact, one owner, one send-by date.

Read this out loud on the demo

1	Facts	Is every name, date, and job in the source — or marked [TO CONFIRM]?
2	Cites	Did it invent a Code section, Pub., or court? If you cannot find it, it goes.
3	Numbers	Do dollars, months, and due dates match the file? Sample figures stay marked.
4	Tone	Would this firm send it? Short sentences. No hype. No apology for having a calendar.
5	PII	Any identifier the model should not have seen? Redact. Do not paste it back.
6	Sign	Would I sign this? If not, it does not leave.

EIGHT ARTIFACTS

Cold outreach · Discovery outline · Decline · Document request · QBO cleanup sequence · Friday snapshot · Texas calendar · 1040 organizer email

EXERCISE KEYS

What good looks like

01 · source-contractor

Cold outreach

90–140 words to a 12-crew GC whose QBO is eight months behind. Offer 30 minutes. Name job cost, draws, retainage.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

02 · screen-discovery

Discovery script

30-minute outline. Two closes: quote a defined project, or decline cleanly.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

03 · screen-decline

Not-a-fit decline

~80 words. Direct. Name the mismatch. No apology for having a calendar.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

04 · onboard-docs

Document request + engagement

Punch list grouped now / this week / as-available. Fees as [BLANK].

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

05 · onboard-qbo

QBO cleanup plan

Numbered sequence for eight dark months. Unknowns flagged. No invented fee.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

06 · implement-snapshot

Friday job-cost snapshot

One page. Cash, AR, unbilled draws, retainage, job margin. Sample figures marked.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

07 · implement-calendar

Texas filing calendar

Next 12 months, only what applies. Firm-owned vs client-owned.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

08 · implement-1040

1040 organizer email

Extension still open. Wall 15 Oct 2026. Drop-dead that leaves review time.

Pass: specific to Twelve Oaks, no invented fee or cite, [TO CONFIRM] where the file is silent, short sentences, would you send it.

CLOSE

Seven-day install

Day 0	Seats provisioned. Voice block (P01) saved as a Project instruction. 7216 consent names the vendor.
Day 1	Two Skills: outreach and document request. One redacted sample file in the Project.
Day 2	WISP clause and engagement insert in the firm’s own words. Not ours copied.
Day 3	First live artifact under review. Not sent. Red-pen on paper or in the doc.
Day 5	Second artifact. Pair-redline. Catch one invented cite on purpose.
Day 7	One approved send. Owner named. Send-by date on the calendar.

FOUNDING TESTIMONIAL

Within 14 days of the founding room, four to six sentences:

What we walked in doing. What we can send now. What we will not let the model do. Whether we would run the room again.

No superlatives required. A name and a city are enough. Recording of the room is included for the founding firm only, for their internal use.