

Understanding the Role of Microsoft 365 in Accounting



Set your browser to
HIGGINS.CNF.IO
For interactive polling
and Q & A

Presented By
John H. Higgins, CPA.CITP
Rochester, Michigan

Learning Goals



- Recognize the full value potential of Microsoft 365 in your accounting practice
- Identify which apps to use for specific business purposes
- Recognize best practices for optimizing your Microsoft 365 deployment

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HIGGINS.CNF.IO

For interactive polling
and Q & A

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Nationally recognized thought leader, advisor, author and speaker on CPA technology

Strategic technology advisor to the profession w/ 35+ years of experience

Founded and sold two CPA technology advisory startups

Former National Mid-market Technology Partner - BDO

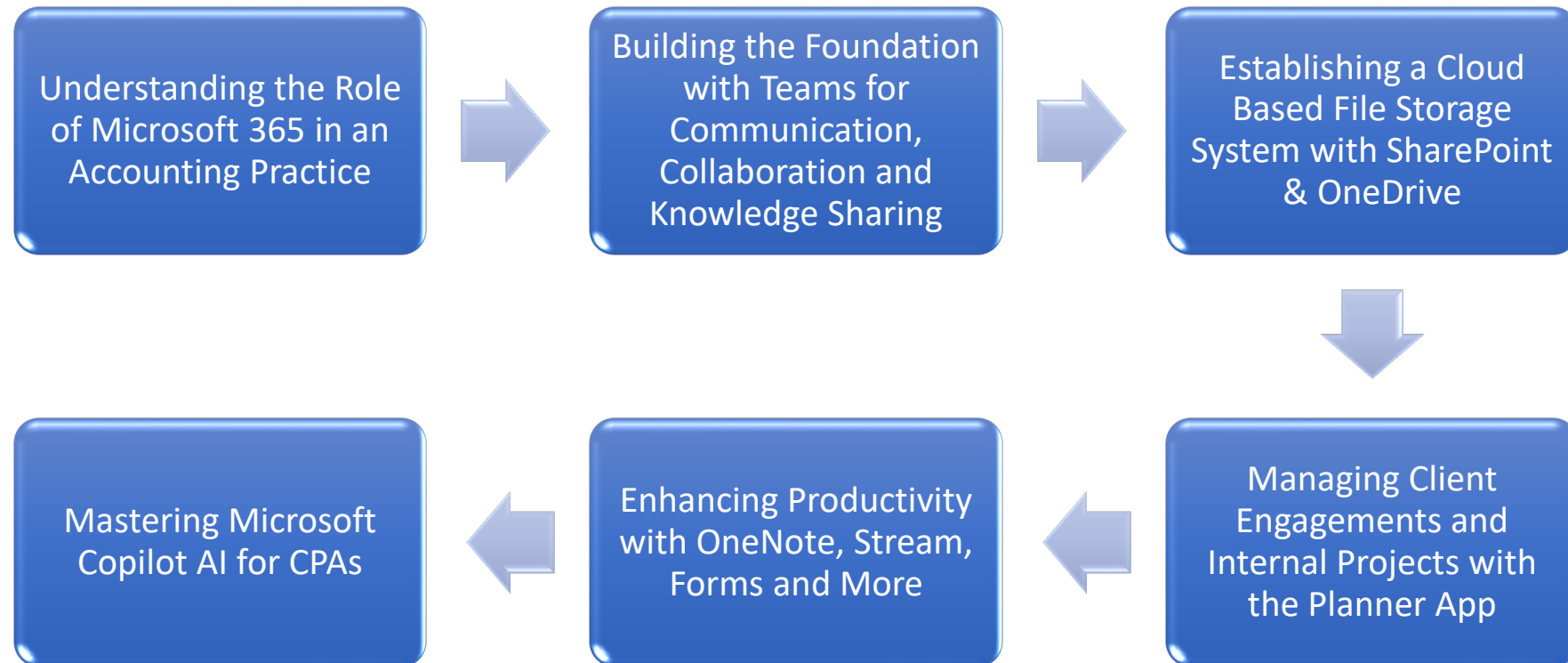
CPA Practice advisor Top 25 Thought Leader for the CPA profession

AICPA Business & Industry Hall of Fame Inductee

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!

Microsoft 365 Power Series for CPAs



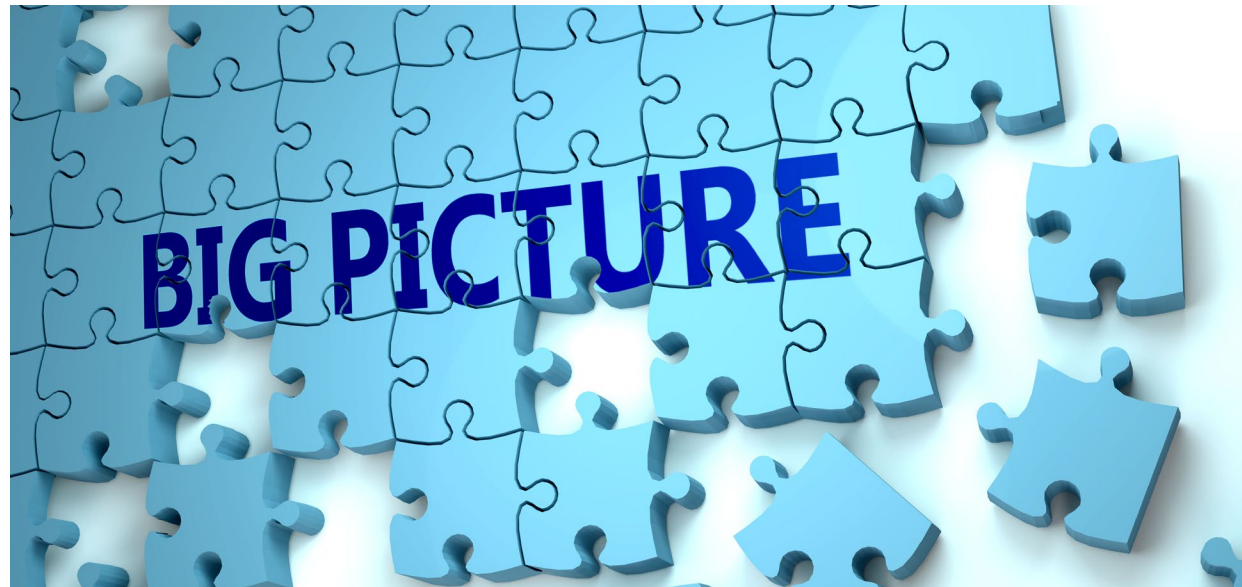
Presentation Outline

- The Microsoft 365 Value Proposition
- Microsoft 365 Apps Ecosystem
- Understanding the Role of Key Apps
- Microsoft Copilot Apps
- Wrap-up

THE MICROSOFT 365 VALUE PROPOSITION



THE “BIG PICTURE”



Microsoft 365 Features



Over 25 integrated desktop, mobile and cloud-based applications



100% cloud-based infrastructure / data management / data security



Subscription based licensing model scales up and down

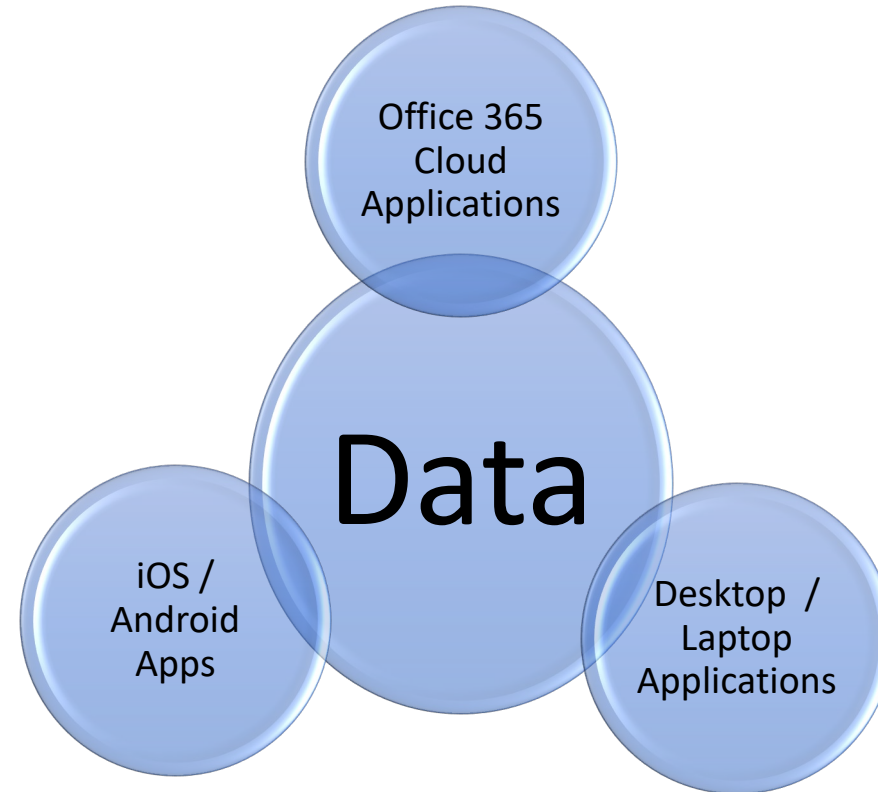


Perpetual upgrades / enhancements applied consistently across the organization



AI powered with Microsoft 365 Copilot

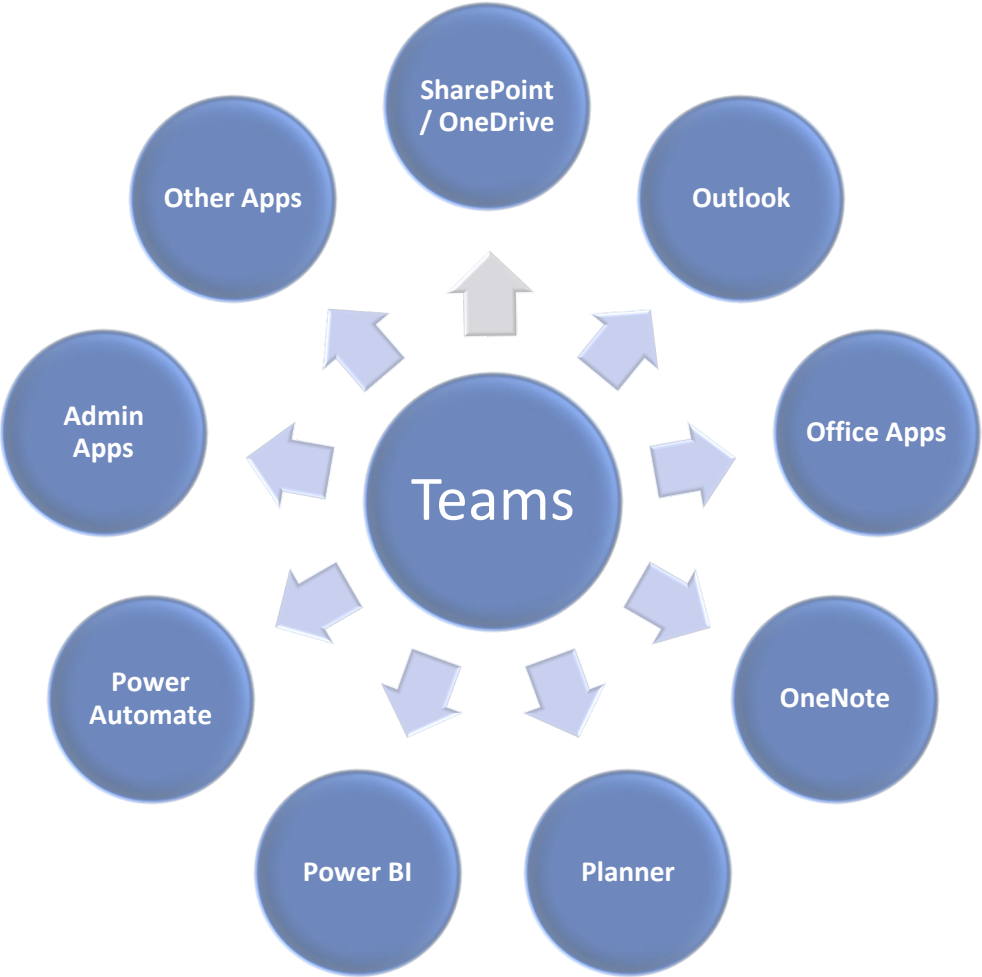
The Microsoft 365 Ecosystem



Key Strategic Benefits of Deploying Microsoft 365

- Enhance communication, collaboration and knowledge sharing
- Simplify your tech stack
- Minimize redundant data handling
- World class data security and disaster recovery protection
- Enable hybrid work environment
- Facilitate business process automation
- Provides foundation for leveraging the potential of AI

UNDERSTANDING THE ROLE OF KEY APPS



Microsoft 365 Apps Ecosystem

Traditional Office Apps	Enterprise Apps	Personal Productivity	Artificial Intelligence
<ul style="list-style-type: none">• Outlook• Excel• Word• PowerPoint	<ul style="list-style-type: none">• Teams• SharePoint• Planner• Power BI• Power Automate• Security & Compliance	<ul style="list-style-type: none">• OneNote• Bookings• To Do• Lists• Stream• Forms	<ul style="list-style-type: none">• Copilot• Copilot Pro• Copilot 365• Copilot in Windows• Copilot Studio• Copilot Security

Teams App – Communication / Collaboration / Knowledge Sharing



The screenshot displays the Microsoft Teams application interface. On the left is a sidebar with navigation icons for Activity, Chat, Calendar, Calls, OneDrive, Copilot, and Apps. The main area is divided into two panes. The left pane, titled 'Chat', shows a list of teams and channels, including 'Demonstration Team', 'CPA Associations', 'Business Operations', 'Facilities', 'Invoices', 'Curriculum', 'Business Development', 'NewCo Startup Coaching Portal', 'General', 'NewCo External', 'NewCo Internal', and 'Clients'. The right pane shows a chat conversation in the 'NewCo External' channel. The chat history includes a welcome message from John Higgins dated 10/8/2023 9:58 AM, a response from Nicole Doe NewCo Owner (Guest) dated 10/8/2023 9:59 AM, and another message from John Higgins dated 10/8/2023 10:01 AM. A notification banner for 'Higgins Advisory, LLC - You can book online!' is visible. Below the chat history, there is a 'Reply' section and a message from John Higgins dated 10/8/2023 11:55 AM titled 'Financial Analysis Sample'. This message includes a file attachment named 'Financial Sample.xlsx' with a description 'NewCo Startup Coaching > NewCo External'.



Teams App Value Proposition

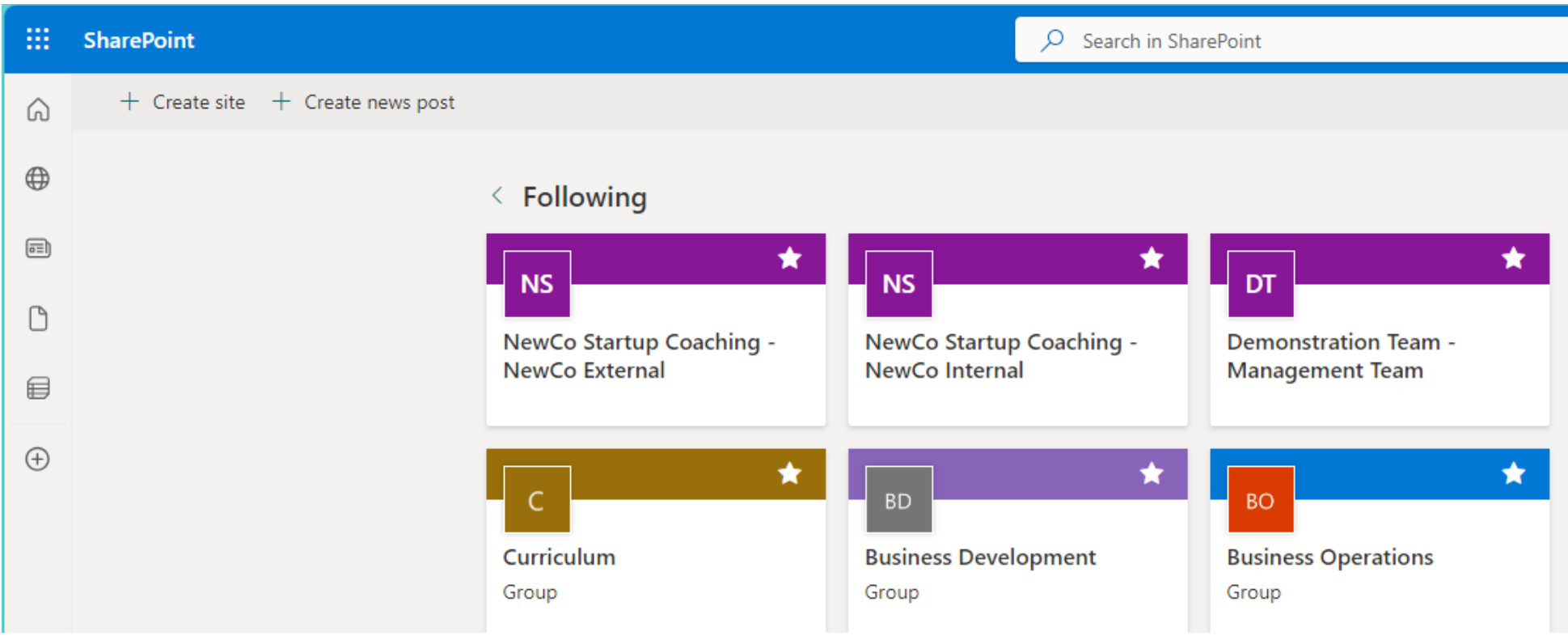
Manage internal conversations and files

Establish external communications and external document exchange portal

Provide launchpad to specific apps, files & websites

Host, document and recap meetings (Internal & external)

SharePoint - Shared File Cloud Storage





SharePoint Value Proposition

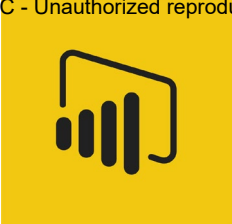
Direct Team / SharePoint relationship

Simultaneous Office file collaboration

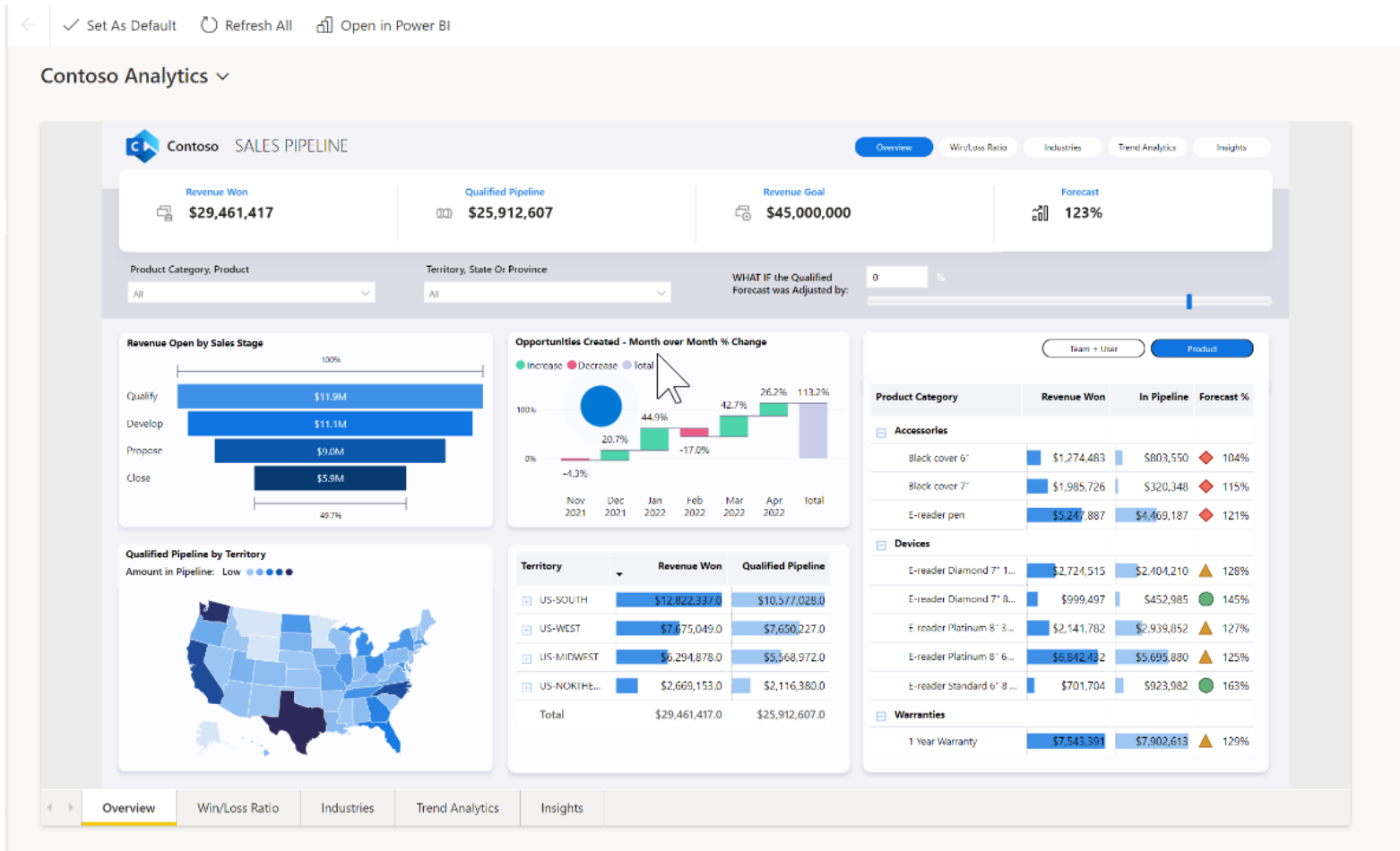
Version history / archive

Eliminate email attachments

Internal and external file sharing



Power BI – Interactive Visual Reporting



Planner – Manage projects from start to finish



The screenshot shows the Microsoft Planner application interface. The top header bar is dark grey with the word 'Planner' on the left, a settings gear icon, and a help question mark icon on the right. Below the header, the left navigation pane is light grey and contains a hamburger menu icon, followed by '+ New plan', 'Hub', 'Assigned to me', 'Pinned', and 'All'. Under 'All', there are two items: 'Chat, teams, channels and apps' (selected) and 'Tax Engagement Demonstration'. The main workspace is white and displays a plan titled 'Chat, teams, channels and apps' for the 'Deployment team'. The plan is organized into five columns: 'Set up this planner', 'Get ready', 'Roll out to early adopters', 'Org-wide rollout', and 'Add new bucket'. Each column has an 'Add task' button at the top. The tasks are organized into buckets with colored headers: 'Project management' (pink), 'Adoption' (yellow), and 'Configuration' (red). A hand cursor is pointing at a task in the 'Roll out to early adopters' column. The tasks include descriptions and progress indicators (e.g., 0/6, 2/3, 1/4, 0/1).

OneNote - Organized Notes Repository



OneNote interface showing a notebook titled "NewCo Startup Coaching Notebook". The left sidebar shows a list of pages: Strategic Planning No..., Coaching Session Not..., SWOT Analysis, Client Interviews, and Strategic Plan Report. The main content area displays a "SWOT Analysis" page with a date of Tuesday, September 26, 2023, at 3:37 PM. Below the date is a link to "Sample Strategic Plan Session Completed.vsd" and a PDF icon labeled "Sample Strategic".

The main content area also features a diagram titled "Assessing NEWCO IT Model" by HIGGINS ADVISORY, LLC. The diagram is a table with the following structure:

Assessing NEWCO IT Model					
BACKGROUND	IT Inventory	Digital Practice Goals & Objectives	Digital Practice Initiatives		OVERALL PURPOSE
Survey results	Primarily desktop PCs with 16 MB RAM	Leverage technology to increase productivity	Remote Access	Web Conferencing	Develop specific recommendations for NEWCO to leverage technology more effectively
Phone System	Dell PowerEdge server 64 GB RAM with Windows 2010	Eliminate manual and redundant tasks	Document Management	Paperless Filing	
More Training	Mix of printers	Capture, process, store and disseminate information digitally	Electronic Workpapers	Multiple Monitors	(1) Increase the awareness of the firm's leaders in regards to CPA Firm technology (2) Assess NEWCO technology model and identify potential IT initiatives
Update/Improve Website	Practice CS	Anytime, anywhere access to all information	Workflow Management	Information Security	
Slow Computers	UltraTax CS/Planner CS	Secure, reliable, low cost IT infrastructure	Client Portal		NON-PURPOSE OF THIS SESSION
	CSA/Engagement CS		Intelligent Scanning		
	QuickBooks		Paperless Practice Management		



Stream App – Document Processes

Stream

Recording in progress

Planner

My Plans > Courseware Development

Live Presentation: Add task

Live In person 100 minutes

WCPE Masterworks for 1040s - Part 2 - Stowe VT 8/11/25

Live virtual 150 Minutes

CPABC - BC Hydro ChatGPT and Copilot Bootcamp - 5/15 & 5/22

Live virtual 150 Minutes

CPABC - ChatGPT and Microsoft Copilot Hands-on Bootcamp - 5/28/25

Live virtual 50 minutes

WICPA School District Conference - Virtual 5/29/25

Webinar rebroadcast 50 minutes

CPAx Update - Synchronize Files to the Cloud with OneDrive and SharePoint

Webinar rebroadcast 50 minutes

CPAx Update - Microsoft 365 Applications Lightning Round

Webinar rebroadcast 50 minutes

CPAx Update - Microsoft Outlook Must Know Email Tips

Task Templates

Live virtual 100 minutes

Live Virtual Template

Session 3

Session 4

Webinar rebroadcast 100 minutes

Pre-recorded Presentation Task Template

Completed tasks 1

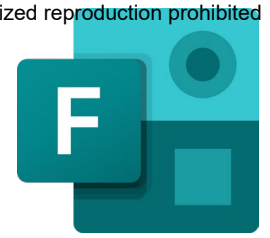
Record again

Review

Step 1: Open Microsoft Teams "First, open the Microsoft Teams app on

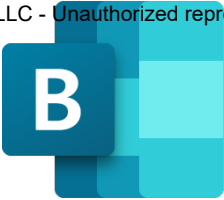
Forms App - Gather data from clients, employees, colleagues

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The screenshot displays the 'Customer Voice' application interface. The top navigation bar includes a 'Saved' status and a user profile icon. The left sidebar contains a menu with options: Home, All projects, Periodic customer feedback (selected), Surveys, Periodic customer ... (with a 'New survey' link), Reports, Alerts, Satisfaction metrics, and Periodic customer survey. The main content area is titled 'Periodic customer survey' and has tabs for 'Design' and 'Send'. The survey content includes a blue header 'Periodic customer feedback', followed by two questions. Question 1 is a 5-star rating question: '1. How would you rate your overall satisfaction with our company?' with options from 'Dissatisfied' to 'Satisfied'. Question 2 is a Likert scale question: '2. Based on your experience with our company in the last three months, please rate how much you agree with the following statements:'. The statements and their corresponding Likert scale options are:

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Does not apply
I've been satisfied with the way support responded to my cases.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is easy to conduct business with {{companyname}}.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have all the resources and information I need (website, customer support, social media)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>





Bookings App – Streamline appointment scheduling



Higgins Advisory, LLC

✓ SELECT A SERVICE

1-hour meeting ☐
Schedule a one-hour meeting
1 hour 

30-minute meeting ☐
Schedule a 30 minute meeting
30 minutes 

Select a service to see available dates and times

👤 SELECT STAFF (OPTIONAL)

Anyone ▾

📅 DATE

< > September 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23

🕒 TIME

Select a service and date to see available times.

Lists App - Create and manage customized lists



Microsoft Lists

+ Add new item

Edit in grid view

Undo

Share

Copy link

Export

Forms **New**

Automate

Integrate

My lists
Higgins Advisory, LLC Expense Tracker ☆ ⓘ

Item	Date	Amount	Category	Description
Postage stamps	September 29, 2023	\$15.00	Postage	20 Forever stamps
Lunch with ABC Co	December 15, 2023	\$45.00	Meals / Entertainmer	
Dinner	July 17, 2024	\$50.00	Meals / Entertainmer	
		Sum 110.00		

New item

Item *

Enter value here

You can't leave this blank.

Date

Enter a date

Amount

\$ Enter a number

Category

Description

Enter value here

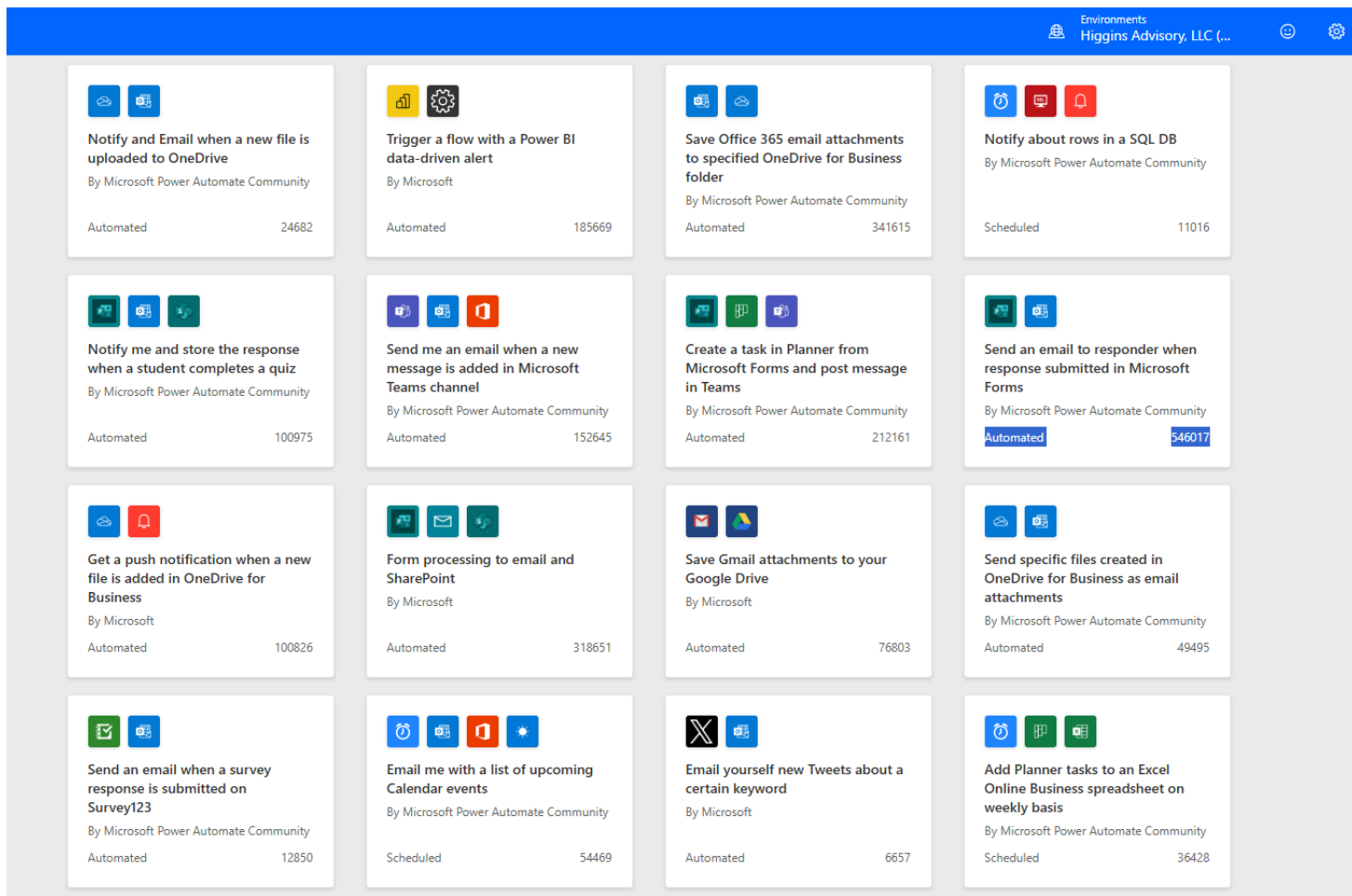
Receipt

Add an image

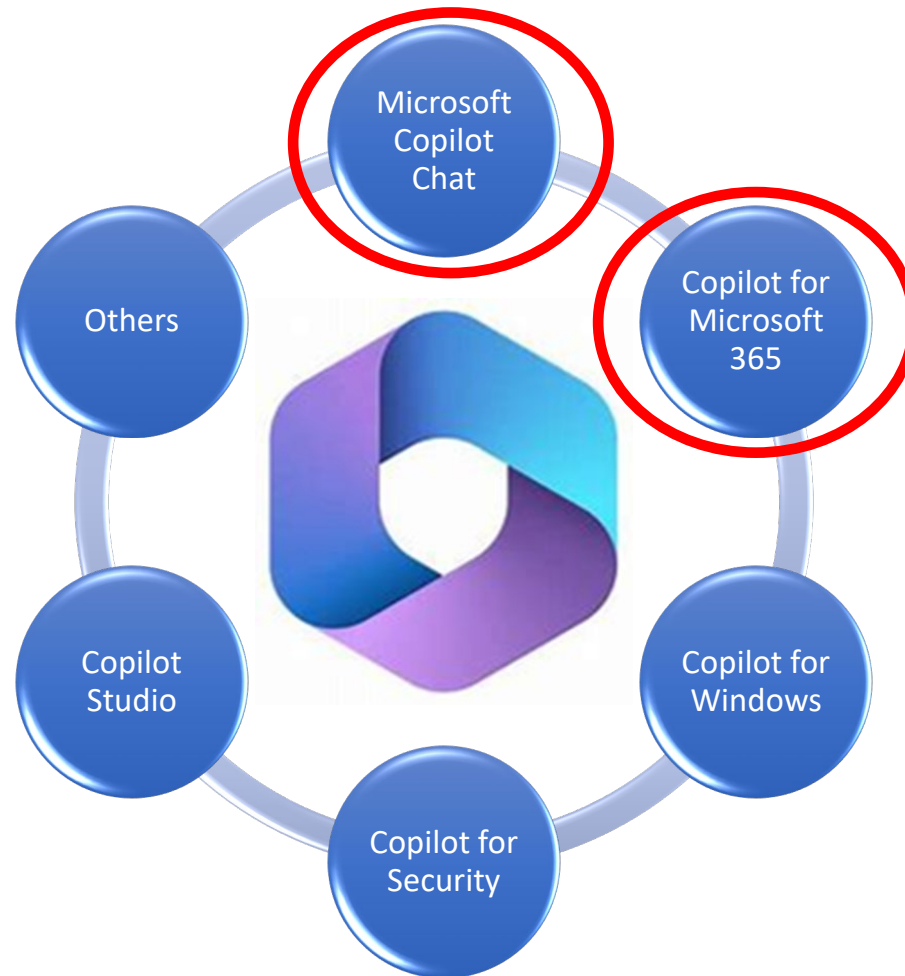
Attachments

Add attachments

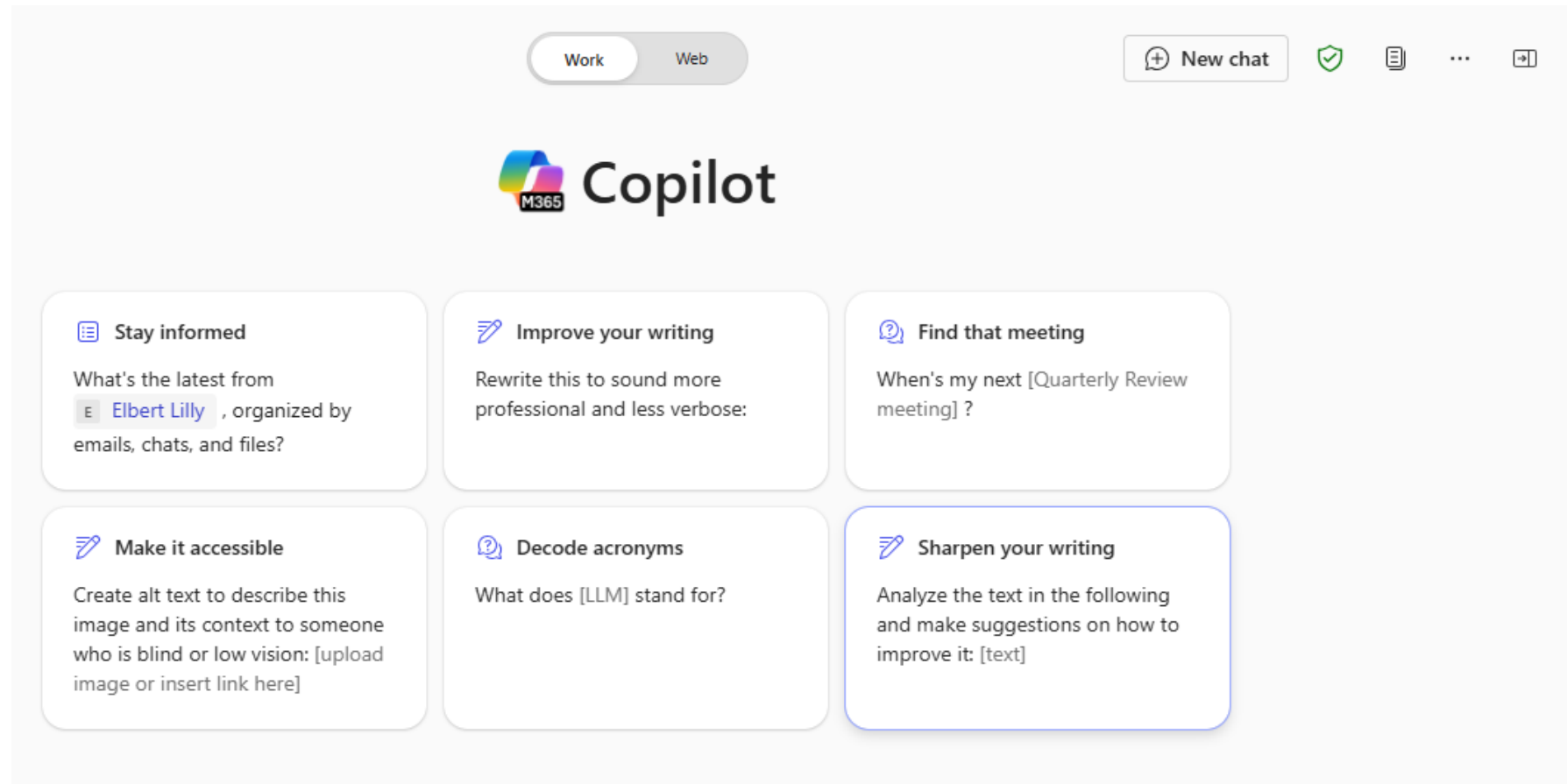
Power Automate – Automate business processes



Microsoft Copilot Apps



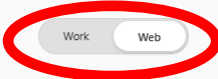
Microsoft Copilot – Prompt across all your data





Copilot Chat Prompt Screen

Copilot “Web” is free
Copilot Pro is \$20 monthly
Copilot “Work” requires Microsoft
365 Copilot is \$30 monthly

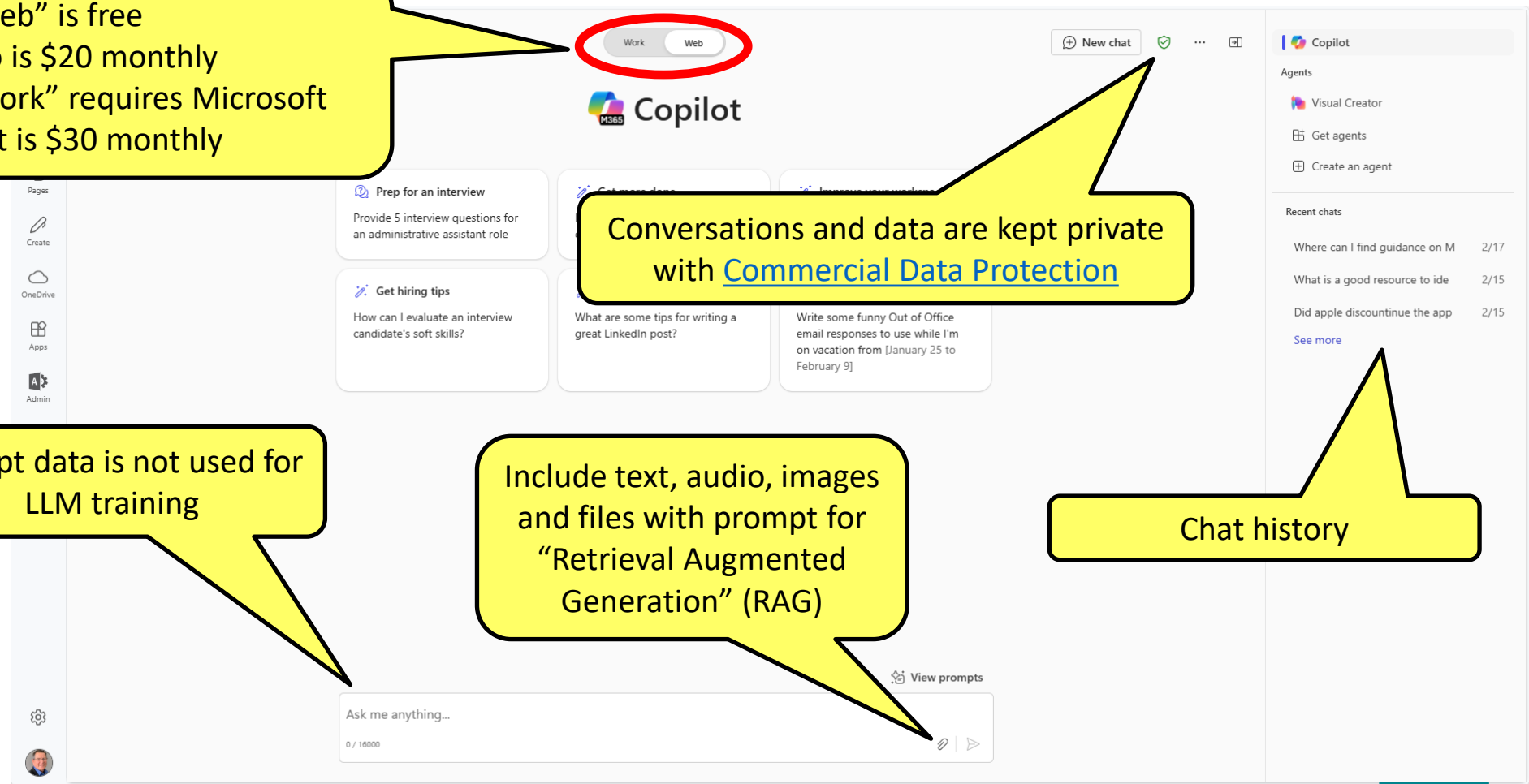


Conversations and data are kept private
with [Commercial Data Protection](#)

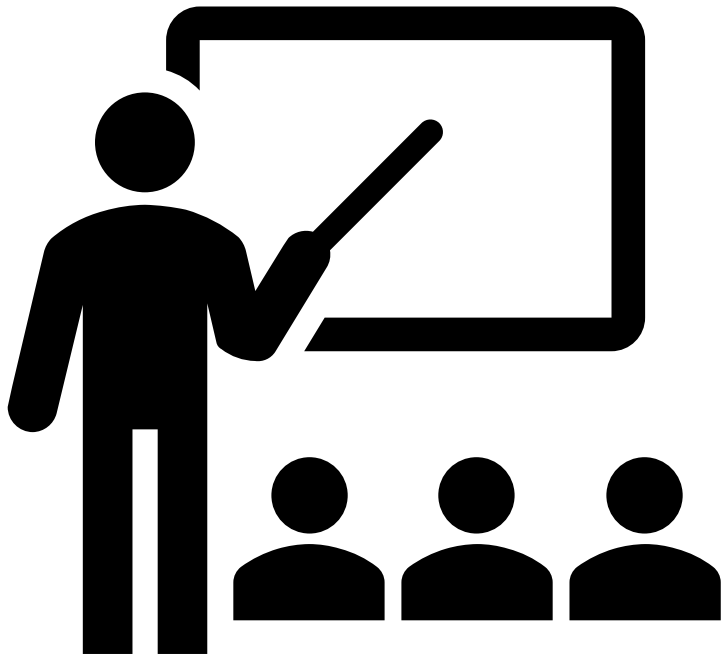
Prompt data is not used for
LLM training

Include text, audio, images
and files with prompt for
“Retrieval Augmented
Generation” (RAG)

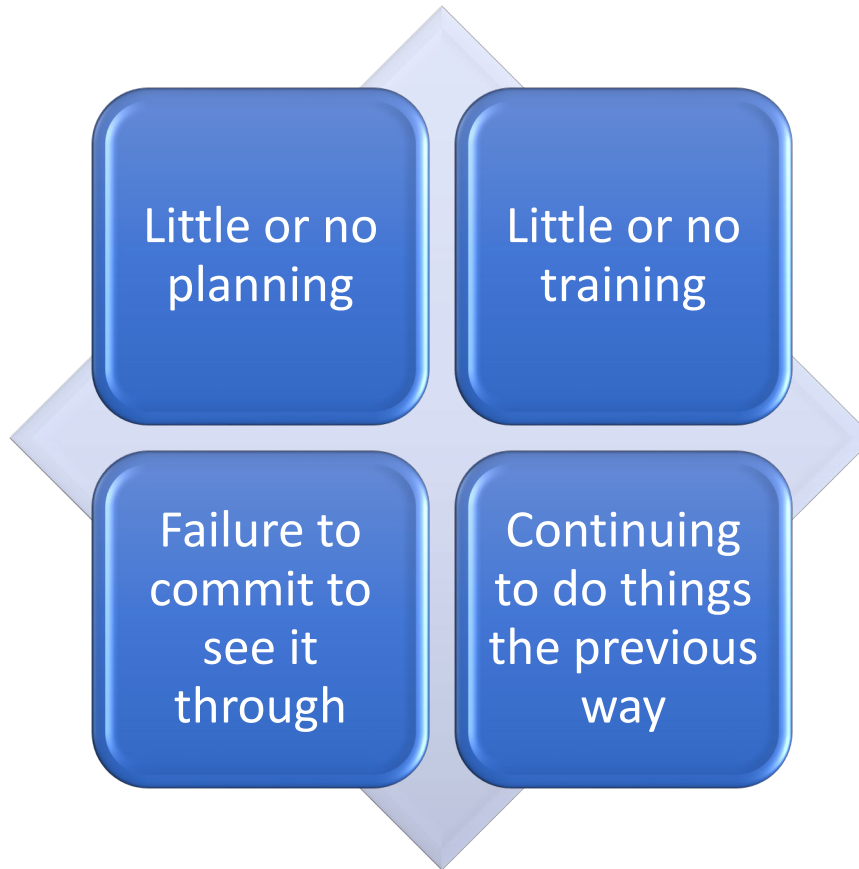
Chat history



WRAP-UP



Common Deployment Failures



In Summary

- The Microsoft 365 ecosystem can play a strategic role in your tech stack
- Develop a strategy optimize your ROI
- Copilot AI functionality is a productivity game changer!

Thank you!!!

Let's connect on LinkedIn →

