

LEA Global

Leveraging AI in L&D

September 3, 2025



Rising Star Association



INTERNATIONAL ACCOUNTING BULLETIN

Agenda

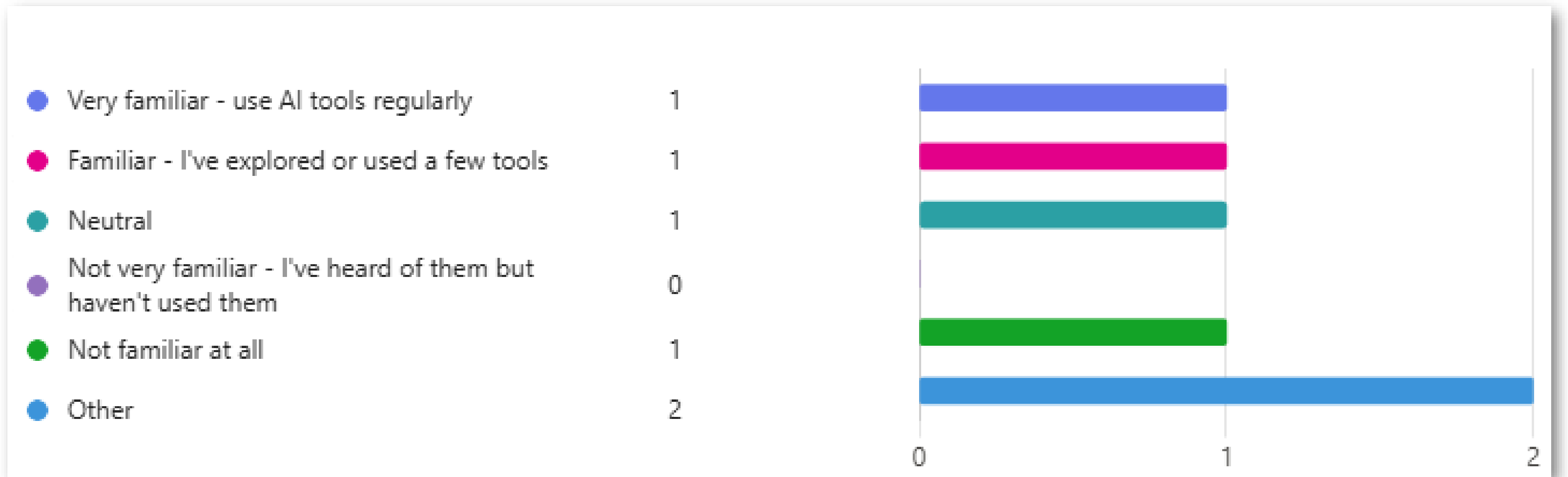
- **Welcome and Introductions**
 - Please display your name and firm name on Zoom
 - Welcome to new attendees!
- **AI in L&D Survey Results**
- **Current AI Applications in L&D**
- **The Power of Prompting**
- **Expanding use of AI at your firm – an IT perspective**
- **Open Discussion**
- **LEA Updates**
 - Carla Blattenbauer, LEA

Today's Facilitators

- Courtney Seeber, Talent Development Senior Manager, Anders
 - Special Guest: Tyler Kaberline, Director of IT, Anders
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Survey Results

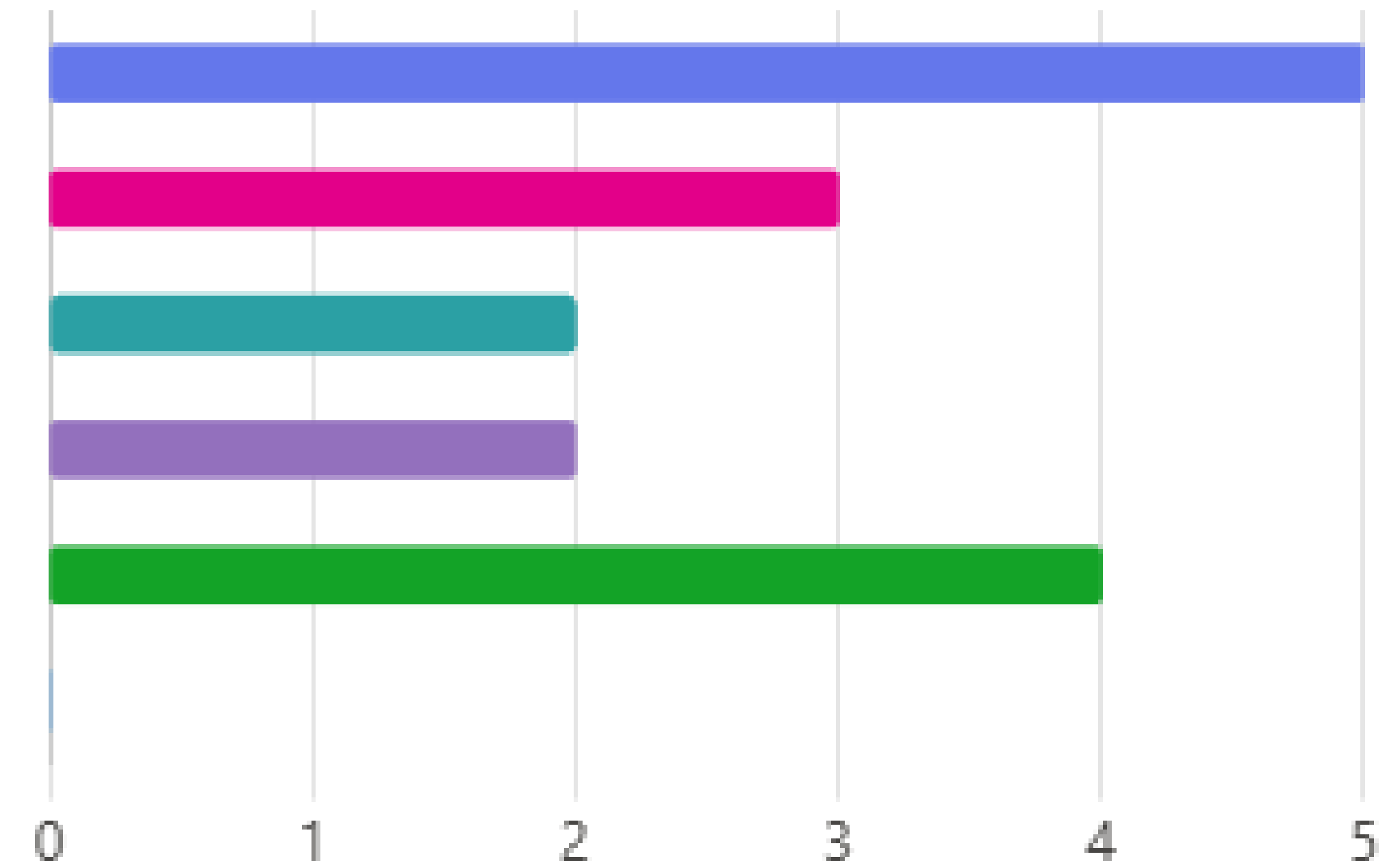
How familiar are you with using AI tools in your role in L&D?



Survey Results

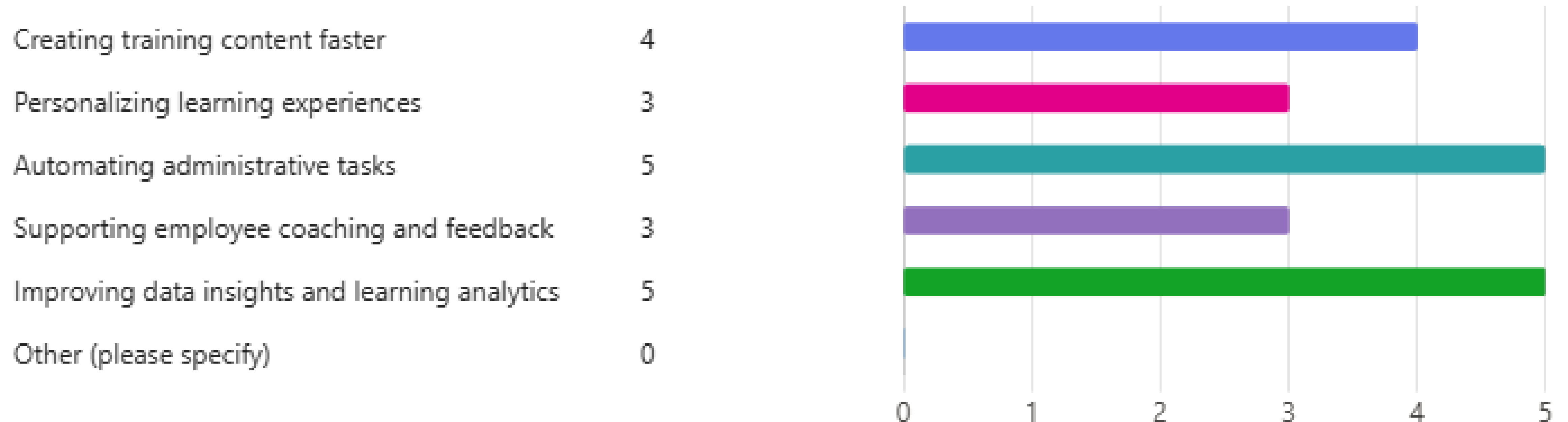
What types of AI skills do you think are most needed at your firm?

Data analysis and interpretation	5
Machine learning and model development	3
AI ethics and governance	2
Natural language processing	2
AI integration with existing systems	4
Other (please specify)	0



Survey Results

In what ways would you like to use AI more to support L&D efforts?



Survey Results

How is your firm currently leveraging AI in L&D?

- Using Microsoft Copilot
 - For writing course descriptions
 - Compile data for courses
 - Writing polling questions
- Synthesia to create training videos
- Create more condensed and concise emails
- Search ideas for training outlines
- Create training summaries
- Summarize evaluation results
- Mapping job role expectations

Current AI Applications in L&D



CONTENT
GENERATION
(OUTLINES, SCRIPTS,
ASSESSMENTS)



ADAPTIVE LEARNING
PLATFORMS



VIRTUAL COACHING &
SIMULATIONS



AUTOMATED
FEEDBACK & DATA
INSIGHTS



TEXT TO IMAGE AND
PRESENTATION/
GRAPHIC TOOLS

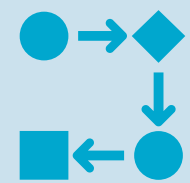
AI Prompts for Learning and Development

- **1. Course Design**
"Create a 60-minute training outline on ethical decision-making for accountants, including objectives, activities, and discussion questions."
- **2. Microlearning**
"Write a 2-minute microlearning script on how to handle a client call about a missed tax deadline. Keep it conversational and scenario-based."
- **3. Assessment Questions**
"Generate 5 multiple-choice questions with correct answers and explanations on ASC 842 lease accounting."
- **4. Job Aids**
"Draft a one-page checklist for new staff on how to prepare client workpapers for audit testing."
- **5. Coaching/Roleplay**
"Act as a difficult client who is questioning a fee increase. Ask me 3 challenging questions so I can practice my response."
- **6. Translation/Simplification**
"Explain the concept of deferred tax assets in simple language suitable for new hires with no tax background."

Tips for Writing Effective Prompts



Role: Tell AI who it is (“You are a CPA exam coach”)



Task: Be specific (“Create 5 flashcards”)



Tone/Format: Define style/output (“Plain language, bulleted list”)



Context: Add details (“For first-year audit associates at a mid-sized firm”).

Expanding AI use at your firm – an IT perspective

- **Anders approach**
 - Innovation and Automation Committee
 - Innovation Think Tank
 - Small Copilot rollouts
 - Copilot Champions

