



PROSPERA
C F O

AI Implementation & Automation

Build an AI workforce that handles the administrative load.
Approved Viktor AI Implementation Specialist.

PROSPERACFO.COM • 888.500.3450 • GROWTH@PROSPERACFO.COM

AN AI WORKFORCE, NOT ANOTHER APP

Automate The Administration. Keep The Judgment.

Most businesses lose hours every week to work that follows a rule: chasing documents, rekeying data between systems, building the same report again, answering the same email. We identify that work, automate it, and leave your team on the decisions that actually need a person.

RATE

\$150

per hour, line-item billed

FIRST BUILD

I

process, proven before we expand

SCOPE

Written

estimate before any build starts

BILLING

Hourly

line-item detail on every invoice

Workflow Automation

Approvals, intake, document routing, reminders, and recurring reporting handled without manual steps.

Systems Integration

Accounting, CRM, payroll, e-commerce, and email connected so data moves once and stays correct.

Custom Dashboards

Reporting built around the numbers you actually run on, refreshed from your own systems.

Team Enablement

Training, documented processes, and support so your staff runs the automation with confidence.

WORK WE COMMONLY AUTOMATE

- ✓ Month-end close checklists and prep
- ✓ AP and AR follow-up
- ✓ Data entry between systems
- ✓ Onboarding and offboarding steps
- ✓ Recurring management reporting
- ✓ Document collection and filing
- ✓ Client and lead follow-up sequences
- ✓ Scheduling and meeting preparation

Why an accounting firm builds your AI

We run our own operation on the systems we install for you: reporting, close, billing, and client communication. You get automation designed by people who understand the financial process underneath it, not a generic integrator learning your business on your budget.

WHERE THE LINE SITS

The agent does

The repeatable work: gathering, entering, matching, formatting, sending, reminding, and reporting on a schedule that never slips.

Your team does

The judgment calls: exceptions, pricing, negotiations, client relationships, and anything that needs someone accountable.

We do

The build, the testing against your real workload, the training, and the tuning once it is running in production.

COMPILE, RECONCILE, ANALYZE

Your Numbers, Assembled Before You Ask For Them

The slowest part of reporting is never the reporting. It is pulling the data, matching it across systems, and chasing the pieces that do not tie. We put agents on that work so the analysis is waiting for you, current and already reconciled.

Compile

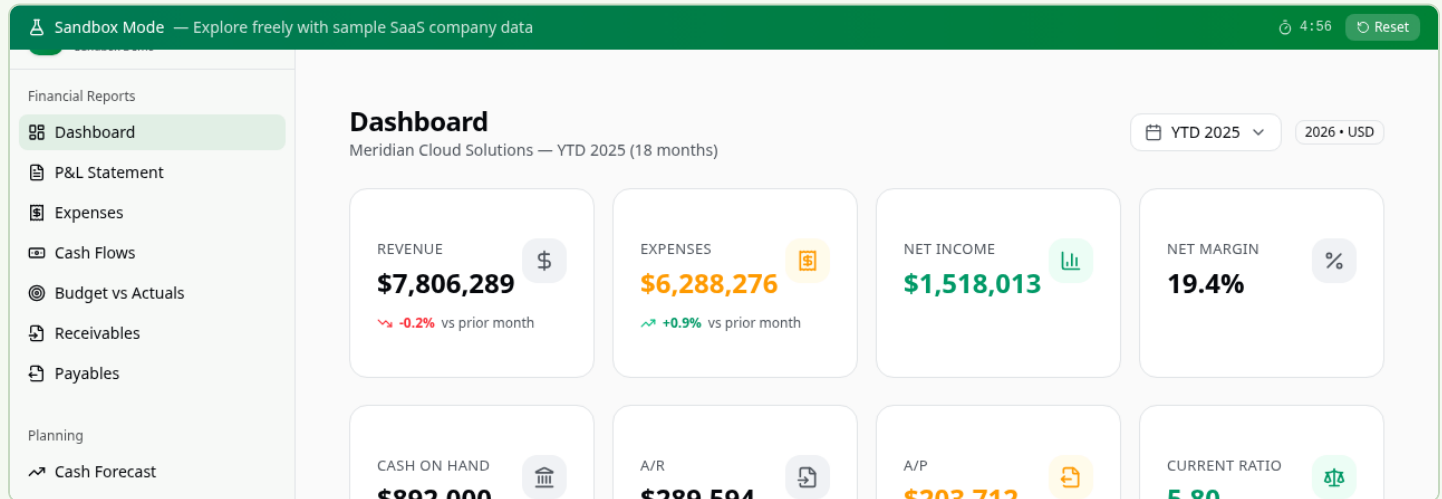
Agents pull from accounting, banking, payroll, POS, e-commerce, and spreadsheets on a schedule, so one source of numbers exists instead of six.

Reconcile

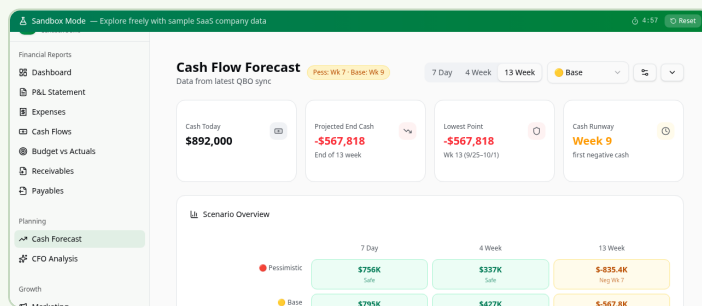
Transactions are matched, duplicates and gaps are flagged, and the exceptions come to a person with the supporting detail attached.

Analyze

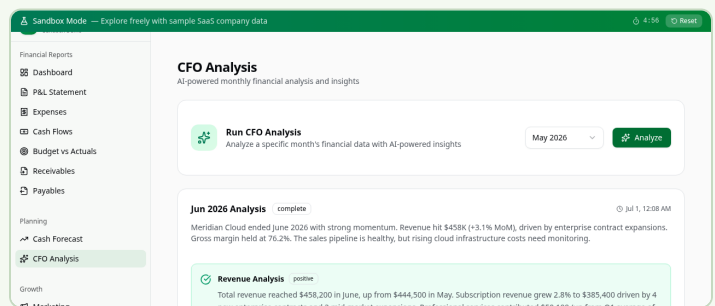
Variance, margin, cash, and trend analysis run automatically, with written commentary on what moved and what it means.



Executive dashboard, refreshed from your own accounting system. Sample data shown.



13-week cash forecast with scenarios and threshold alerts.



Monthly analysis written by the agent, reviewed by your CFO.

Reporting you can act on the first week of the month

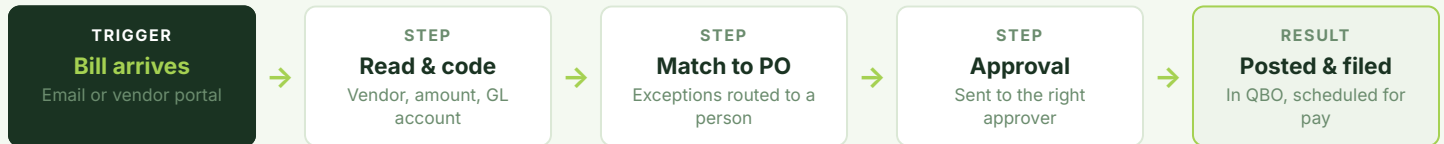
Dashboards are built around the numbers you actually run on, not a stock template. Budget versus actual, receivables aging, margin by line, cash runway: whatever drives your decisions gets a title, a trend, and a plain-language read on what changed.

WHAT AN AUTOMATED WORKFLOW LOOKS LIKE

A Trigger, A Set Of Steps, And A Finished Result

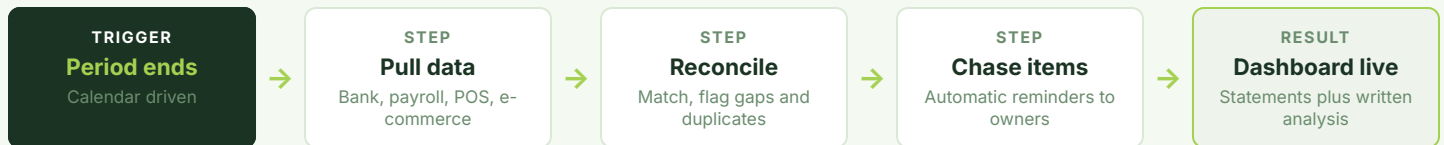
A workflow is simply work that always happens the same way. Something starts it, a sequence of steps runs, and a result lands where it belongs. Once that sequence is written down, an agent can run it every time, on time, and only involve a person when something falls outside the rules.

VENDOR BILL TO PAYMENT



Removes the rekeying and the chasing. Your team touches only the exceptions.

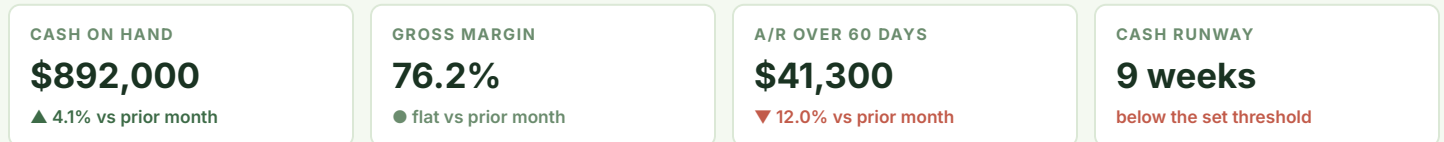
MONTH-END CLOSE



The close checklist runs itself, so review starts days earlier.

CUSTOM DASHBOARDS BUILT ON YOUR SYSTEMS

Every workflow above feeds reporting. We connect accounting, banking, payroll, CRM, e-commerce, and point of sale, then build the tiles you actually manage by. Not a stock template: your metrics, your definitions, refreshed automatically.



Illustrative tiles. Yours are defined with you during discovery.

Clarity, not another login

The point of the build is that the answer is already assembled when you go looking for it. One place to see cash, margin, receivables, and what changed this month, tied directly to the systems your business already runs on.

FROM FIRST CALL TO RUNNING SYSTEM

A Project You Can Scope, Fund, And Measure

1 Discovery

We review how the work gets done today, what it costs in hours, and where it breaks.

3 Build & Integrate

We connect the systems, build the automation, and test it against your real workload.

5 Optimize

We tune what is running and expand into the next process once the first one holds.

2 Scope & Estimate

You receive a written scope with the automation targets, the build sequence, and an hour estimate.

4 Train & Hand Off

Your team is trained on the finished workflow with documentation they can maintain.

6 Report

Custom dashboards show what the automation is doing and what it is saving.

IMPLEMENTATION

\$150

per hour

INCLUDES

- ✓ Discovery and process mapping
- ✓ Build, integration, and testing
- ✓ Training and documentation
- ✓ Detailed line-item billing

CUSTOM PROJECT

Scoped

estimated after discovery

BEST FOR

- ✓ A defined problem to solve
- ✓ Multiple systems to connect
- ✓ Custom reporting builds
- ✓ Fixed budget planning

Start with a project brief

Tell us about your company and what you want solved at ProsperaCFO.com/quote. It takes about two minutes and ends with your discovery call booked, so we arrive already reviewed with an initial direction on scope and cost.

BEYOND AI

Your Complete Outsourced Finance Department

AI implementation is one piece of what Prospera CFO delivers. Our full-service model gives growing businesses CFO-level strategy, Controller precision, and dependable accounting operations, at a fraction of the cost of an in-house finance team.

CFO PACKAGES

Core

Monthly bookkeeping, reconciliations, P&L and balance sheet reporting, and quarterly CFO strategy meetings.

Core-Plus

Everything in Core, plus a dedicated Controller, budget management, cash flow reporting, and monthly strategy sessions.

Premium

Full CFO + Controller + Staff Accountant team with HR & payroll, fractional leadership, and board-ready reporting.

CUSTOM & HOURLY

Build Your Own Team

Choose the roles and hours you need. Transparent hourly billing with detailed line-item invoices.

Fractional CFO

Strategic financial leadership: planning, forecasting, and growth advisory on demand.

Fractional Controller

GAAP-compliant financials, audit-ready books, and treasury oversight.

Staff Accountants

AP, AR, payroll, reconciliations, and month-end close.

TECHNOLOGY PLATFORMS

Every client runs on best-in-class platforms, set up and managed by our team:

QuickBooks Online

Cloud accounting & real-time visibility

Eddy HR

Hiring, payroll, and HR management

Ramp

Corporate cards and expense management

CorpNet

Entity setup and compliance filings

Prospera Intelligence

AI dashboards and CFO analysis

QBO

INTEGRATED

30

DAY ONBOARDING

5

INTEGRATED PLATFORMS

Live

DASHBOARD REPORTING

Ready to put AI to work in your business?

Chad Heberly, Founder & CEO, Prospera CFO
Growth@ProsperaCFO.com | 888.500.3450
301 N Main St, Suite 202 • Pueblo, CO 81003

[SCHEDULE A DISCOVERY MEETING →](#)**PROSPERACFO.COM**