

CASE STUDY

Claude AI Enablement for Accounting

How a Professional Accounting Team Recovered 40+ Hours Per Month in Four Sessions

Company Overview

K's Simple provides trusted accounting, strategic guidance, and modernized financial operations. The firm helps clients streamline systems, and integrate software while delivering reliable accounting, payroll, and business consulting services.



The Challenge

The accounting team was carrying a substantial manual processing burden across three recurring workflow categories. None of the tasks required specialized judgment; they were high-frequency, rule-based, and time-consuming because they involved moving and formatting data across systems that did not talk to each other.

Remittance Processing

K's was manually processing remittance files for 35–37 clients from a single raw data sheet containing up to 16,000 line items. The process required sorting, filtering, generating individual client files, applying password protection, and verifying figures against a pivot table, a 1x/month process, taking approximately 40-50 hours.

Report Formatting

The team was exporting QB P&L and transaction data to Excel, then manually reformatting columns, cell structures, and number formats. This multi-step process was described as "overkill" but unavoidable given the constraints of both platforms. Repeated weekly or monthly per client.

Recurring Reports

K's accountants were running Flash reports on a recurring schedule, which entailed compiling data from source files, adding specific formulas, and distributing to leadership. Without a saved template driving the process, each run required re-explaining the format requirements or manually re-applying them.

4

SESSIONS

3

CORE WORKFLOWS

40+

RECOVERED HRS/MONTH

\$20

SUBSCRIPTION/MONTH

The Approach

Varium used a four-session structure that moved from orientation to live execution with real data. Each session built on the last. The participants were introduced to Claude Cowork, the agentic model in which Claude reads files, writes and executes code, and returns finished outputs without requiring the user to manage each step.

Program Focus	What Happened
Session #1: Foundations	Live demo: 62 transactions pulled from fake bank statement PDFs, categorized against a ledger template, organized by month.
Session #2: Workflow ID & Live Automation	QB P&L reformatting workflow automated live, along with a Flash report run against fake data (template gap identified). Introduced a Skills concept to save a workflow once, run it forever without re-explaining.
Session #3: Real Data Execution	A remittance workflow executed live against actual data (~16,000 line-item source file). 34 individual remittance files generated, password-protected, and verified against their pivot table. Figures matched exactly.
Session #4: Outcomes & Next Steps	Time savings quantified. Pensato DMS demonstrated as enterprise-grade companion platform. Each has Claude access and a roadmap for weekly report automation.

An Unexpected Outcome: Knowledge Transfer & Succession Planning

What happens when a key person leaves or is unavailable?

The accounting team's workflows were heavily dependent on an individuals' expertise. They knew the client codes, the data structures, the edge cases. Claude Skill files change that dynamic: they are shareable Word docs. Any Skill a team member builds can be handed directly to a colleague who then invokes it with a single instruction.



"Cowork gives me direct access to my live desktop data so I can push, pull, and manipulate information. Autopilot runs the recorded tasks across the sites I use. The DMS ties it all together as the central hub for organizing everything."

— Allen Alexander, K's Simple

A successful training isn't defined only by what gets automated in the room — it's measured by how participants rethink what's possible afterward.