

From Spreadsheets to Agents

Real-World AI for Valuation & Property Tax

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Fireside chat • 60 minutes • 4:00–5:00pm (Thu, Jan 22, 2026)



A productivity step-change

**“A skyscraper full of human computers →
one person with a spreadsheet → one person managing
thousands of agents.”**

AI Agents are the next leap



Quick show of hands

Where's your biggest friction today?

Classification

(Taxable/Reporting/Useful life/ Exemptions)

Forms

(Selection, Population, Attachments)

Defensibility

(Audit Traceability)

Appeals

(Preparation, Valuation)

Data

(Collection, Validation)

Other?

Ask about Personal Property Tax...



We'll map agents to the workflows you live every day.

Properly designed agents = dynamic workflows, not magic

What it IS

- Uses tools to execute steps (retrieve, draft, check)
- Grounded in approved sources of truth
- Has clear goals for success
- Produces citations, assumptions, and a review checklist

What it ISN'T

- Standard ChatGPT/Google Search
- A black box you trust without citations
- A substitute for accountability or sign-off
- A system that invents rules when it can't find them

Tools to Use



LangChain



CURSOR



n8n

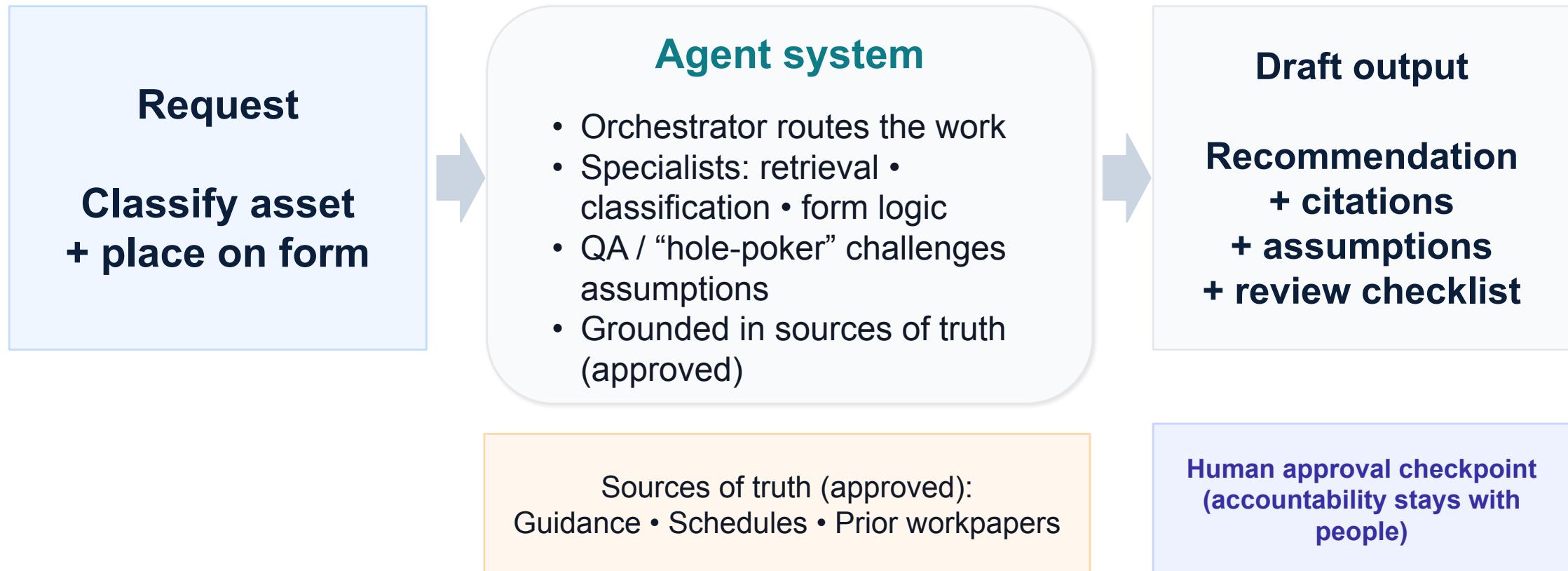


Google AI Studio



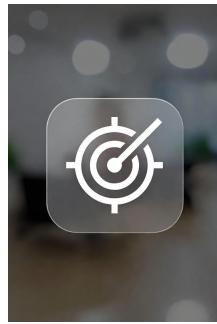
Claude Code v2.0.0
Sonnet 4.5 · Claude Max
/user/clause-code

A compliance-first agent workflow



Key idea: constrain inputs • require citations • log the path • keep humans accountable.

Example 1 (Return Filing): asset classification → schedule selection → form placement



1. Identify asset + context

2. Retrieve jurisdiction rules (cite)

3. Recommend class + schedule (cite)

4. Draft Return + support packet

Human verifies schedules until fully validated (target state vs. today)

Goal: fewer manual steps + better consistency + a clear support trail.

Example 2: “Find the rule. Cite it. Apply it.”

- Find the rule (approved sources)
- Cite the rule
- Summarize + apply (assumptions visible)

Uncited = suspect.

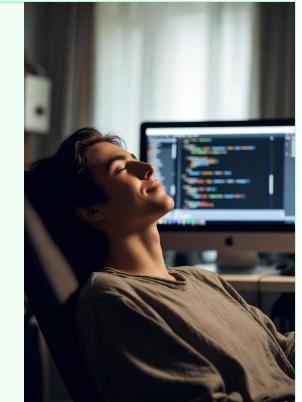
Before

Research → source it →
manual memo + rework



After

Curated sources →
cited summary →
draft support memo



Defensibility stack (because mistakes are expensive)

Constrain inputs



Require citations



Audit the reasoning path (conversation log)



QA / red-team review



Human checkpoints



Interaction #2

Would you allow AI to...

- Draft a Return
- Recommend Asset Classification
- Submit Returns/Appeals/ Payments



How to start (without getting burned)

1) Pick one workflow

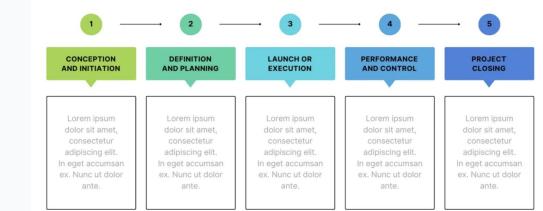
High digital volume • clear rules • measurable outcome



2) Curate sources of truth

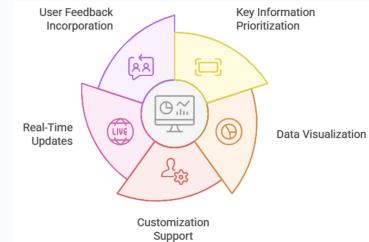
State published manuals • schedules • prior workpapers

Project Management



3) Automate testing → pilot → measure → expand

Accuracy • citation coverage • cycle time • exceptions caught



Data readiness note: PDFs/tables can be tricky—make sources “table-ready” when possible.

Q&A

The gold is sources of truth + audit trails.

Pick a workflow → constrain + cite → human sign-off → scale