

TWO-DAY PRACTITIONER WORKSHOP

AI-POWERED FINANCE

2 Days

CONSECUTIVE, 9:00 AM START

9 Modules

PRACTICE-HEAVY FORMAT

12–24

PARTICIPANTS PER COHORT

DESCRIPTION

This intensive two-day workshop equips finance professionals with practical, hands-on skills for applying generative AI across reporting, planning, and day-to-day finance operations. Participants move from foundational concepts to real hands-on practice — using AI to accelerate reporting, support forecasting, and streamline repetitive finance processes — and leave with a concrete plan for applying what they've learned back on the job.

The workshop is deliberately practice-heavy: every concept is followed by a hands-on lab where participants work on their own real tasks, not generic examples. By the end of Day 2, each participant will have a working prompt library and an adoption plan they can put to use immediately.

1-MONTH AI TOOL SUBSCRIPTION INCLUDED

Every participant gets a month of paid access to the workshop's primary AI tool.

BEFORE YOU ARRIVE Pre-work sent 3–5 days before Day 1

A short 10-minute introductory video or article on generative AI

One reflection prompt: where do you currently spend the most manual or repetitive time in your finance work?

Instructions for creating a free account with the workshop's primary AI tool



AI-POWERED FINANCE

OUTCOMES & AUDIENCE

LEARNING OBJECTIVES

By the end of this workshop, participants will be able to:

- Explain what generative AI is, how large language models work at a practical level, and where they genuinely add value in finance – and where they don't, including accuracy and hallucination risk in numeric work.
- Apply generative AI to accelerate financial reporting, analysis, and forecasting.
- Apply AI to strengthen risk management, controls, and fraud or anomaly detection.
- Write clear, effective prompts to reliably produce finance outputs such as variance commentary, board memos, and policy summaries.
- Use AI to automate repetitive finance processes such as reconciliations, invoice processing, and expense review.
- Apply a practical framework for responsible, accurate, and compliant use of AI in financial processes – including data privacy, model risk, and auditability.

WHO THIS IS FOR

FP&A analysts and managers

Treasury and cash management teams

Internal audit, risk, and compliance teams

Financial controllers and accountants

Financial analysts and finance business partners

Finance leaders and CFO-office staff who want a practical, non-technical introduction to generative AI

FORMAT & DURATION

Duration: 2 consecutive days, 9:00 am – 5:00 pm (7 instructional hours per day; 14 hours total, including breaks)

Delivery: in-person or live virtual; identical content and timing for both modes

Group size: 12–24 participants

PREREQUISITES

No coding or technical background is required.

Working familiarity with core finance processes – reporting, budgeting, reconciliations, or the month-end close – is helpful but not mandatory.

A laptop with a stable internet connection and access to spreadsheet software (Excel or Google Sheets).

A free account with at least one general-purpose AI chat tool (setup instructions sent as pre-work).

CURRICULUM

MODULES

DAY 1 FOUNDATIONS & CORE APPLICATIONS

01 Foundations of Generative AI for Finance

What generative AI is, how large language models produce text and analysis, major model families, realistic capabilities and limits — including accuracy and hallucination risk in numeric work

03 Prompt Engineering for Finance

Structuring prompts for accurate numeric analysis, variance commentary and memos; verification techniques to catch errors before they reach a report

05 AI in FP&A, Budgeting & Forecasting

Scenario planning, driver-based forecasting support, and budget narrative drafting with AI

02 The AI Toolkit for Finance

Guided tour of general-purpose assistants, spreadsheet copilots (Excel/Sheets AI), financial modeling and FP&A copilots, and reporting/BI assistants; how to choose the right tool for a task

04 AI-Powered Financial Reporting & Analysis

Generating variance commentary, MD&A drafts and board-ready summaries from raw data; quality-checking AI output against source numbers

DAY 2 ADVANCED APPLICATIONS, RISK & CONTROLS

06 AI for Process Automation in Finance

Invoice processing, account reconciliations, expense report review, and accelerating the month-end close

08 What's Next: AI Agents & Multi-Step Workflows in Finance

What “agentic” AI means for close, reporting and analysis workflows; realistic near-term outlook

07 AI for Risk, Controls & Fraud Detection

Anomaly detection, compliance monitoring, and flagging unusual transactions or reporting patterns

09 Responsible & Accurate AI Use in Finance

Data privacy and confidentiality, model risk and hallucination in numeric contexts, auditability, regulatory considerations, and evaluating vendors

TAKE-HOME MATERIALS

Your own prompt library, built during the Day 1 labs

An adoption plan for one real finance process

The complete slide deck and participant workbook

A curated list of AI tools relevant to finance — assistants, spreadsheet copilots, FP&A and reconciliation tools

A one-page responsible-AI-in-finance checklist

A 1-month subscription to the workshop's primary AI tool

A certificate of completion

ASSESSMENT & SUPPORT

Assessed on active participation and applied output, not a written exam

Completion of a personal prompt library during the Day 1 labs

An optional, ungraded self-check quiz at the end of Day 2

30 days of WhatsApp support after the workshop for questions and troubleshooting

PUBLIC CLASS

RM1,800

per pax · HRD Corp claimable

IN-HOUSE

Contact us for group discount rates and tailored delivery for your organization.

