



# AI for Finance Mini Lab

Use AI to report faster, analyze smarter, and focus on the work that moves the business.

LEVEL 2



50 participants



Virtual or F2F



3.5 hours



## Why do you need this?

The pressure on finance teams isn't slowing down: tighter close cycles, more requests for insight, and growing expectations from leadership, all with the same (or fewer) resources. AI can help, but only if your people know how to use it well.

This program gives your finance team practical experience applying AI to real finance tasks, from drafting commentary and analyzing data to exploring how agents can safely handle repetitive workflows. Everyone leaves with a playbook and a plan for what to do differently from now on.

## Business outcomes

- Compress reporting and commentary cycles without cutting corners.
- Surface sharper insights from data, faster, with less manual effort.
- Map and prioritize the highest-value AI use cases for your finance function.
- Shift capacity from repetitive admin towards business partnering and strategic analysis.

## By the end of this program you will:

1. Know what gen AI can and can't do reliably in a finance context.
2. Apply AI hands-on to core finance workflows: reporting, analysis, summarization, and narrative drafting.
3. Evaluate where agents and automation can safely accelerate finance processes.
4. Leave with a prioritized implementation plan tailored to your team's context.

**3.6 hours** average time saved **per person, per week**

## How it Works

- A half-day, hands-on program built around the workflows finance teams use every day.
- Runs virtual or face-to-face, based on your preferences.
- Led by two expert facilitators with practical tips, live demos, and real-time support.
- Every activity uses company-authorized tools on finance-relevant scenarios.
- You'll get a takeaway playbook so the learning doesn't stop when the session does.
- Customised to your organization's AI maturity, tools, and compliance requirements.

## Do the Thinking, Not the Typing

Walk away with the prompts, workflows, and confidence to compress reporting cycles, sharpen analysis, and free up headroom for the work that moves the business.



"Inspirational and a great way to demystify it all. Good to have hands-on experience trialling everything."

**Kate Green, Pan Macmillan**

## Program Breakdown



### Setting the Scene

What's real and what's hype? A grounded look at where AI is useful for finance, and where it isn't. Quick pulse check on your team's starting point.

### Module 1: Hack Your Productivity

A prompting masterclass applied to finance work. Practice turning raw inputs into structured updates, summarizing threads into actions, and running simple data analysis.

### Module 2: Using Agents for Finance

Go beyond prompts. See a pre-built finance agent in action, discuss what makes agents safe and auditable, and map where they could fit into your team's processes.

### Module 3: Use Case Hackathon

Your team identifies the quickest wins, then maps one key process end-to-end, defining success criteria and building an implementation plan.

### Module 4: Data Analysis Deep Dive

Work with AI to analyze datasets, pull out key trends, and draft the narrative commentary that turns numbers into decisions.

### Module 5: Personal Action Plan

Choose 2-3 concrete finance tasks and define exactly which AI tools you'll use, when, and how you'll judge success.

### Wrap-up

Recap the topics covered with time for Q&A. Share the final survey which unlocks the Playbook takeaway.

### Takeaways

*AI for Finance Playbook with workflows, prompts, and an implementation roadmap to take back to your team.*