



Building AI Agents for Finance

A hands-on program that helps automate reporting, accelerate analysis, and gives your finance team back their time.

LEVEL 3



25 participants



Virtual or F2F



2x 3.5-hour sessions



Why do you need this?

Finance teams run on repeatable processes: reporting, variance analysis, commentary, reconciliation. AI agents can automate the predictable parts – with humans in the loop for judgment and sign-off.

This hands-on workshop teaches your team how to design, build, and deploy real AI agents for everyday finance tasks. You'll leave with a working prototype and a clear plan to scale safely.

Business outcomes

- Offload repetitive finance admin to AI agents.
- Remove bottlenecks in reporting cycles and data reconciliation.
- Boost team capacity for business partnering and strategic analysis.
- Turn financial processes and data into automated, auditable workflows.

By the end of this program you will

1. Understand the capabilities and limitations of AI agents in a finance context.
2. Identify and prioritize high-value agent use cases with appropriate governance.
3. Design and build a working AI agent prototype using your authorized tools.
4. Leave with a clear plan for building and scaling AI agents in your finance team.

Delivered in your tech stack:



85%

of participants reported increased productivity in using AI

How it Works

- Structured workflow that takes you from idea to deployment of an AI agent for your finance team.
- Two expert facilitators to guide you through with tips, tricks, and examples.
- Hands-on activities using your company authorized tools (Copilot, Claude, Lovable etc).
- Application task between sessions to embed practice into your work.
- Includes a takeaway prompt pack and simple frameworks to repeat the process.
- Adapted to your AI maturity and compliance requirements.

Application Task:

Between Part 1 and Part 2, test your prototype agent with your peers and team. Gather early stage feedback to help you improve.



"This program provided great insights. Seeing a structured approach to prompts was really useful. Being taught the ability to build a GPT yourself was very cool and will be very helpful in my day-to-day role."

Tamara Breitbart, Publicis DACH

Learner Journey



Part 1: Design & Build

1. Intro to AI Agents

Learn what AI agents are, where they deliver value, and how they differ from AI assistants. Introduce the finance brief we will work on.

2. Define Your Agent

Map your finance workflows to identify high-impact ideas. Then create a clear agent use case and map out its scope, role, and boundaries.

3. Give Your Agent a Brain

Ground your agent in relevant finance knowledge: reporting templates, policy docs, chart of accounts, and historical data using retrieval (RAG) patterns.

4. Give Your Agent Tools

Connect your agent to finance tools and systems. Define triggers, actions, and simple workflows so the agent can take meaningful action.

Part 2: optimize & Deploy

5. Rebuild Your Agent

Take feedback from testing with your team and peers, and run through the agent build process again, refining and improving.

6. Test and Optimize Your Agent

Test your agent against realistic scenarios then finalise its prompts, rules, and guardrails to improve reliability and performance.

7. Live Demos and Feedback

Demo your working agents to the group. Reflect and share lessons learned. Get extra power user tips from the expert facilitators.

8. Roadmap

Identify your next priority agent opportunities and define a clear, practical plan for piloting and scaling agents in your finance team.