training code: HR-AI / GenAI_finance / EN

GenAI in finance: from prompt to decision

This is not an inspirational lecture about technology. It focuses on how to transform the day-to-day work of finance professionals — from time-consuming tasks into value-adding activities.

The training is designed for those who want to understand how AI can support their work with data, reports, spreadsheets, and the communication of financial results.

During the sessions, we test AI in practice: working with legal and financial texts, budgets, management commentary, and repetitive accounting processes. Participants learn when AI truly saves time — and when its outputs need to be approached with caution and double-checked before use.

We operate on one key assumption: AI is a partner, not a replacement for humans. The finance professional remains fully responsible for the outcome — AI simply helps achieve it faster and with less effort.

That's why a central focus of the training is not only how to use AI, but how to stay in full control of it.

Training recipients

- Accountants
- Controlling Specialists / Controllers
- Financial Analysts
- Financial Reporting Specialists
- SSC/GBS Professionals
- Accounting Firm Professionals

Benefits

- understands when it makes sense to use AI — and when it's better not to;
- knows how to prompt the model in a way that delivers useful results, not just "smart-sounding" answers;
- can verify whether the model's output is correct — both substantively and numerically;
- understands the boundaries of safe and responsible AI use;
- returns to work with a set of ready-to-use, tested prompts that can be applied immediately.

Training program

Module I: A Realistic View of AI — What It Can Do, What It Can't, and Who Is Responsible

- Generative AI vs. rule-based automation — why this distinction matters in finance
- Overview of LLMs available on the market, including **ChatGPT**, **Microsoft Copilot**, **Google Gemini**, and **Claude** — key differences and how to choose the right tool for the task
- The **AI Act** from a user's perspective — what obligations already apply to finance teams
- Where the model's role ends and the finance professional's responsibility begins — a boundary that should not be crossed

Module II: How to Work with AI to Get Meaningful, Not Just "Smart-Sounding," Answers

- Why the same question produces different results across tools — and what that means in practice
- Building effective prompts with financial context: accounting standards, role, and expected output format
- Prompt libraries — how to create and manage reusable templates for KPI analysis, reporting, and management communication
- Hallucinations — where they come from and how to deal with them

Module III: Where AI Saves Time — Mapping Routine Work and First Implementations

- Diagnostic exercise: mapping repetitive tasks and identifying where AI can support them
- Automating summaries and notes — reducing time spent working with documents
- The trade-off between speed and quality — how to recognize and manage it
- Exercise: the same task completed with and without AI — what changed and what needed correction

Module IV: AI and Numbers — Analytical Support with Human Oversight

- KPI and budget variance analysis — how AI helps structure thinking about causes, not just numbers
- Forecasting and FP&A scenario analysis — AI as a comparison tool, not an oracle
- Financial storytelling and management commentary — turning dense tables into clear messages
- Fraud detection and anomaly identification — where AI signals, and where human judgment is required
- Exercise: full analysis using AI on a sample dataset

Module V: One Message, Different Audiences — Adapting Communication with AI

- Management reporting for different audiences: finance teams, executives, business units — different goals, questions, and narratives
- Automating reporting — reducing preparation time from hours to minutes
- Creating presentations and executive summaries from detailed analyses
- Exercise: transforming one document into three tailored versions for different business audiences

Module VI: Responsibility, Risk, and What You Take Back to Work

- The **AI Act** explained in plain language — what it means for finance professionals
- What data should never be entered into LLMs — working with sensitive information in line with company policies
- Three questions for every AI output: Is the source reliable? Does the logic hold? Is the risk acceptable?
- Audit and transparency — how to document AI-assisted work to clearly separate model output from human decisions

Expected preparation of the participant

A workshop, not a lecture. The trainer introduces each topic, and participants immediately apply it on their own devices. Everyone works with the AI tool they already use or want to explore — there is no single mandatory platform.

Training Includes

Each participant receives the presentation in digital format, along with a set of ready-to-use prompts for everyday financial work.

Duration

1 days / 6 hours

Language

english