

## AI for Senior Accountants and Finance Managers

### Program Overview:

AI for Senior Accountants and Finance Managers is an intensive 2-day training program designed for corporate finance professionals. It equips participants with a practical toolkit of free AI tools they can use immediately, no technical background required. The program follows a proven 5-phase structure: identifying real pain points → available technologies → comparative AI tool discovery → hands-on exercises on real-world cases → personal implementation roadmap. Every participant leaves with tested tools, validated prompts, and a concrete action plan tailored to their organization.

### Objectives:

By the end of the training, each participant will be able to:

- Identify the finance tasks and process for AI implementation.
- Use key free AI tools on real finance cases
- Significantly reduce time spent on repetitive, low-value tasks: data entry, reconciliations, variance commentary, consolidations
- Produce CFO-quality analyses, reports in a fraction of the usual time
- Build a realistic AI implementation roadmap, prioritized against their own time and budget constraints

### Target Audience:

The program is designed for intermediate to senior finance professionals:

- Senior Controllers / Management Accountants
- Finance Managers
- Senior Accountants / Chief Accountants
- Reporting & Consolidation Managers

Typical profile: 5 to 15 years of experience, strong Excel proficiency, familiar with ERP systems (SAP, Sage, QuickBooks), but with little or no exposure to AI tools in a professional finance context. No coding or programming skills required.

### Duration:

2 days, 8:30 AM to 5:30 PM

16 hours of effective training, combining structured input, live demonstrations, and hands-on exercises (30/70 theory-to-practice ratio).

### Trainers:

Dominique Valerie Augsburg (7 hours)

Dr Vivegananda Thylammai Padayatchy (7 hours)

## Programme

| Day   | #  | Module                                                                                                                                                  | Duration   |
|-------|----|---------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Day 1 | 1  | <b>Pain Points</b><br>Participants map and share their real operational challenges; clustering and collective prioritization                            | 2h00       |
| Day 1 | 2  | <b>Technologies</b><br>Overview of the finance tech stack: ERP exports, RPA, BI, and AI, what each layer does and when to use it                        | 1h45       |
| Day 1 | 3  | <b>AI Tools Discovery</b><br>Hands-on comparative testing of free AI tools (ChatGPT, Claude, Copilot, ...)                                              | 2h15       |
| Day 1 | 4a | <b>Hands-On Exercises</b><br>E1: Budget variance analysis / E2: 12-month cash flow forecast (3 scenarios)                                               | 1h00       |
|       |    |                                                                                                                                                         |            |
| Day 2 | 4b | <b>Hands-On Exercises (cont.)</b><br>E3: Balance sheet analysis & key ratios / E4: Anomaly detection in accounting journal                              | 1h30       |
| Day 2 | 4c | <b>Hands-On Exercises (cont.)</b><br>E5: Board deck preparation / E6: Monthly close memo (prompt engineering)                                           | 1h30       |
| Day 2 | 5  | <b>Implementation Roadmap</b><br>Individual roadmap build (constraints: time & budget) + group presentations challenged by trainers + 30-day commitment | 4h00       |
|       |    | <b>Total</b>                                                                                                                                            | <b>14h</b> |