

AI for Finance Teams

Hands-on AI for finance, with the controls-and-risk discipline carried over from our regulated-industry work.

WHO IT'S FOR

Finance, FP&A and
controllership teams.

FORMAT

In-house workshop

LENGTH

Half-day or full-day

What your team walks away with

Apply AI across finance work with the right controls — and spot where its output should not be trusted.

What you'll learn

- ✓ Identify the finance tasks where AI saves real time today, with practical examples
- ✓ Use AI to support analysis, reporting and forecasting without losing rigour
- ✓ Apply controls that keep AI output trustworthy enough to rely on
- ✓ Draw a clear line on what financial information must never be pasted into a chatbot
- ✓ Check AI work properly before it feeds into a number or a decision
- ✓ Leave with a controls-aware AI playbook built for finance workflows

Curriculum

01 Where AI saves finance teams real time today

- Which routine finance tasks AI can genuinely speed up, and which it can't
 - Drafting commentary, summarising long documents and tidying messy data
 - Categorising transactions and pulling figures out of statements
 - Spotting the 'Excel ceiling' — when spreadsheets stop scaling and AI helps
 - Quick wins your team can try the same week
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02 Analysis, reporting and forecasting with AI assistance

- Generating first-draft variance commentary from the numbers
 - Summarising trends and performance for executives and stakeholders
 - Supporting budgeting, scenario and sensitivity analysis without coding
 - Ratio, vertical and horizontal analysis with AI as a second pair of eyes
 - Using AI to draft forecasts while keeping ownership of the assumptions
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03 Writing prompts that get useful finance output

- The anatomy of a good finance prompt: role, task, context, format
 - Giving the tool the right figures and constraints to work from
 - Asking for output in tables, summaries or commentary you can reuse
 - Iterating when the first answer misses, instead of accepting it
 - Building reusable prompt templates for recurring finance jobs
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04 The controls that keep AI output trustworthy

- Treating AI output like any other input that needs a control around it
 - Where a human review is mandatory before a number is used
 - Catching numerical inconsistencies and broken logic in AI work
 - Keeping a clear trail of what AI produced and who checked it
 - Carrying a controls mindset from regulated work into everyday finance
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05 Confidentiality: what never to paste into a chatbot

- The financial information that must never go into an outside AI tool
- Public chatbots versus approved enterprise tools, and why it matters
- Understanding when a tool may keep or learn from what you type
- Safe ways to work with sensitive figures without exposing them
- Simple team rules everyone can remember and follow

06 Checking AI work before it reaches a decision

- Why a confident, fluent answer can still be wrong
 - A quick verification routine for AI-assisted analysis and reports
 - Cross-checking AI figures against the source data
 - Spotting hallucinated facts, stale data and false precision
 - Knowing when AI assistance is good enough — and when to start over
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07 A practical finance AI playbook

- Pulling approved use cases, controls and rules into one reference
- A starter prompt library for common finance tasks
- A short 'what to check' list for any AI-assisted output
- The confidentiality do's and don'ts on a single page
- A playbook your team can adopt and keep building on

You keep

A controls-aware AI playbook for finance workflows.

Arthiq — live, in-person AI training for high-stakes teams.

Book a session: founders@arthiq.co · <https://arthiq.co>