AFP LEARN

Digital Finance

FINANCE TRANSFORMATION & AI SERIES

— **Financial Analytics Mastery: Essential Tools for Data-Driven Decision-Making**

— **Advanced Financial Analytics: Harnessing Generative AI for Strategic Decision-Making**

— **Machine Learning in Finance: Practical Applications and Ethical Considerations**

— **Finance Leadership in the AI Era**

— **Understanding the Case for Artificial Intelligence (AI) in Forecasting and Analytics**

FINANCE TRANSFORMATION & AI SERIES

Financial Analytics Mastery: Essential Tools for Data-Driven Decision-Making

COURSE LENGTH

Three 2-Hour Virtual Sessions or
One Full Day In Person

DESCRIPTION

In today's data-driven financial landscape, robust analytics and data management skills are imperative for staying ahead. This comprehensive course is specifically designed for finance professionals, equipping them with the essential tools and techniques for effective business analytics. Gain practical knowledge to tackle modern financial challenges, streamline processes, and become a catalyst for a data-centric culture within their organization.

LEARNING OBJECTIVES

— Collect, assemble, and analyze financial data effectively.

— Identify and implement the right technological solutions to enhance financial analytics.

— Act as an ambassador for data-driven decision-making within your organization.

— Present valuable and actionable financial insights aligned with organizational goals.

AGENDA

— Mastering Financial Data
  - Understanding financial data types and structures
  - Data quality and integrity in finance
  - Building rich financial data models
  - Hands-on exercises in business intelligence and data modeling using financial datasets.

— Leveraging Financial Technology Solutions
  - Enterprise solutions in finance
  - Decision-support technologies for finance professionals
  - Utilize extract, transform, load (ETL) process for financial data
  - Implement reporting and narrative BI for financial storytelling
  - Trends in financial technology solutions
  - Building a financial solutions framework

— Leadership and Change Management in Finance
  - Navigating digital transformation in finance teams
  - Driving sustainable change

FINANCE TRANSFORMATION & AI SERIES

Advanced Financial Analytics: Harnessing Generative AI for Strategic Decision-Making

COURSE LENGTH

Two Days In-Person

DESCRIPTION

In today's fast-paced financial environment, staying ahead requires more than basic data skills. This advanced course is designed specifically for finance professionals who want to deepen their analytics capabilities. The participants will learn how to maximize the value of their financial data, implement efficient processes, and harness the power of Generative AI to drive strategic decision-making.

As Generative AI technologies revolutionize financial analytics, this comprehensive course offers a perfect blend of advanced analytics foundations, practical applications, and innovative use of Generative AI. It will equip the participants to handle modern financial data's scale, speed, and complexity and become leaders in data-driven finance.

LEARNING OBJECTIVES

— Analyze complex financial data more effectively.

— Implement advanced data management techniques specific to finance.

— Develop lean and sustainable processes within financial functions.

— Leverage Generative AI to enhance financial analytics.

— Collaborate efficiently with IT and data science teams.

— Present actionable financial insights to drive strategic decisions.

AGENDA

— Advanced Data Management for Finance
  • Profiling techniques for financial data
  • Master data management in finance
  • Focused and impactful data quality management
  • Data cleansing and preparation
  • Hands-on: natural language coding for Efficient Data Preparation

— Lean and Sustainable Process Design in Finance
  • Focusing on value-adding activities
  • Best practices in financial process design
  • Continuous process improvement techniques
  • Building synergies with it and data science

— Natural Language Coding with Generative AI in Finance
  • Understand the impact of Generative AI on Finance
  • Generative AI coding for financial data preparation
  • Creating rich financial data models
  • Hands-on coding: Advanced data preparation with GenAI

FINANCE TRANSFORMATION & AI SERIES

Machine Learning in Finance: Practical Applications and Ethical Considerations

COURSE LENGTH

Three 2-Hour Virtual Sessions or
One Full Day In Person

DESCRIPTION

As AI reshapes the financial landscape, finance professionals must navigate this technological revolution with pragmatism and insight. This comprehensive course is designed to equip the participants with a deep understanding of Machine Learning processes and their applications in finance. Through hands-on practice, they will experience data assessment, feature selection, model training, and model interpretation and explore the ethical considerations crucial in AI deployment.

LEARNING OBJECTIVES

— Understand the fundamental concepts of AI and Machine Learning in a financial context.

— Apply machine learning techniques to solve practical financial problems.

— Use no-code AI tools to perform advanced data analyses.

— Interpret and communicate the results of AI models effectively.

— Recognize and address ethical considerations in AI applications.

— Identify opportunities to leverage AI within your organization for strategic advantage.

AGENDA

— Foundations of AI in Finance
  • The Need for AI in Finance
  • Demystifying AI and Machine Learning
  • Capabilities and Limitations of AI
  • The AI Process End-to-End

— Machine Learning in Action for Finance
  • Predictive analytics with regression models
  • Outcome prediction with classification models
  • Clustering and anomaly detection
  • Time series analysis for trend prediction
  • Data selection and model interpretation
  • Hands-on practice with no-code AI tools

— Ethics in AI
  • Case studies on AI ethics
  • Understanding risks and benefits
  • Building ethical AI frameworks

FINANCE TRANSFORMATION & AI SERIES

Finance Leadership in the AI Era *Page 1 of 2*

COURSE LENGTH

Three 2-Hour Virtual Sessions or One Full Day In Person

DESCRIPTION

In an era where Artificial Intelligence is transforming the financial landscape, finance leaders must navigate these changes with insight and strategic vision. This comprehensive course will equip the participants with the knowledge and skills to lead in analytics, harness AI technologies, and drive sustainable organizational change. Through real-world case studies, they'll learn how their team can manage financial data at scale, leverage cutting-edge technology solutions, design efficient processes, and implement impactful and ethical AI projects.

LEARNING OBJECTIVES

— Drive your team to harness financial data effectively and at scale.

— Strategically leverage financial technology and decision-support systems.

— Lead your finance team through successful digital and AI transformations.

— Establish effective master data management and data quality practices.

— Apply lean principles to design efficient and sustainable financial processes.

— Understand and implement AI solutions for predictive analytics and decision-making.

— Build and promote ethical frameworks for AI use in finance.

— Foster synergy between finance, IT, and data science teams.

— Utilize advanced analytics to inform and influence strategic initiatives.

AGENDA

— Mastering Financial Data
  • Driving data excellence in finance teams
  • Ensuring data quality and integrity
  • Develop sustainable data collection methods

— Leveraging Financial Technology Solutions
  • Assess and map out your team's current technology solutions
  • Explore fundamental technologies crucial for finance professionals
  • Stay ahead by understanding emerging trends and innovations

— Leadership and Change Management in Finance
  • Guide your finance team through digital transformation initiatives
  • Cultivate a culture that embraces change and continuous improvement

— Maximizing Data for Results
- Leadership in Master Data Management
- Lead impactful data quality strategies to enhance analytics
- The revolution of Natural Language Coding

— Lean and Sustainable Process Design in Finance
- Focusing on Value-Adding Activities
- Apply industry best practices to streamline financial operations
- Utilize techniques for ongoing process enhancements.
- Building Synergies with IT and Data Science

— Foundation of AI in Finance
- Understand why AI is crucial for modern financial operations
- Demystifying AI and machine learning
- Capabilities and limitations of AI
- Case studies in machine learning for finance
- Leading sustainable AI processes

— Ethics in AI
- Analyze instances where AI led to ethical dilemmas in finance
- Understanding risks and benefits
- Building ethical AI frameworks

FINANCE TRANSFORMATION & AI SERIES

Understanding the Case for Artificial Intelligence (AI) in Forecasting and Analytics *Page 1 of 2*

COURSE LENGTH

Three 2-Hour Virtual Sessions or
One Full Day In Person

DESCRIPTION

We are entering the era of digital FP&A where human and artificial intelligence (AI) work hand in hand to achieve better analytical results. The new world of FP&A requires on-demand continuous planning process and AI-driven forecasts where various business scenarios can be played almost in real-time. Both driver-based planning and FP&A predictive analytics are essential tools for implementing flexible dynamic planning and forecasting processes to achieve increased revenue growth, profits and improved operating performance.

LEARNING OBJECTIVES

— Understand what AI-Enabled Analytics is and how it can help FP&A teams

— Learn how to sharpen decision-making using sound judgement, critical thinking, and AI-Enabled Analytics

— Learn frameworks to implement powerful AI-Enabled Analytics into action

— Demonstration of a case study around implementation of AI-enabled budgeting, forecasting, and analytics

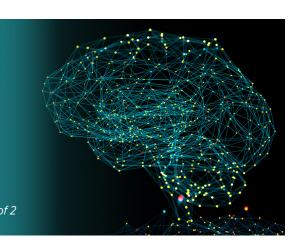— Learn how to sustain implemented AI-Enabled Analytics

AGENDA

— Introduction

— Why AI-enabled analytics is the next competitive edge

  • What is AI-enabled forecasting and predictive analytics?

  • How does it compare with business intelligence tools?

  • How have high-performing companies achieved better results using AI-enabled predictive analytics and decision management?

— The AI-enabled predictive analytics model

  • What are the key elements of AI-enabled predictive analytics, including data structures such as fields, dimensions, and indicators?

  • Defining the requisite framework

  • Business partner role and contributions

— Define mindset stages

- Review key attributes by stage and their relevance to AI-enabled predictive analytics

- Define techniques to improve decision management

- Implementing analytics-driven annual budgeting and monthly forecasting

- Define the budgeting and forecasting process and describe how to implement it in an effective AI-enabled system.

- Discuss the roles and responsibilities and ownership of data and results necessary for an effective AI-enabled predictive analytics and decision management function

— Implementing AI-enabled predictive analytics capabilities

- Reviewing AI-enabled predictive analytics maturity map

- Defining implementation roadmap and detail steps

- Review alternative techniques to define and refine an organization's approach to implementation

- Design a process that enables the organization to predict future outcomes based on cause-and-effect relationships

- Data capture in terms of the context and relevance of how AI-enabled predictive analytics and decision management will be applied

- Walk-thru "in-detail" implementation case study

— Class use cases – (1) defining variables and (2) building analytical scorecard using KPIs

- Determine how to select KPIs and how to organize their data capture and use in the performance management process

- Define and review key criteria to selecting critical few and how to leverage analytic results

— Wrap-up

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About AFP®

As the certifying body in treasury and finance, the Association for Financial Professionals (AFP) established and administers the Certified Treasury Professional (CTP) and Certified Corporate Financial Planning and Analysis Professional (FPAC) credentials, setting the standard of excellence in the profession globally. AFP's mission is to drive the future of finance and treasury and develop the leaders of tomorrow through certification, training, and the premier event for corporate treasury and finance.

12345 Parklawn Dr Ste 200
PMB 1001
Rockville, MD 20852
T: +1 301.907.2862

WeWork Beach Centre
15 Beach Road #02-01
Singapore 189677
T: +65 8879 2988

www.AFPonline.org