Syllabus

Using Microsoft Artificial Intelligence for Finance & Accounting

Duration: 6,00 hrs, 1,00 day(s)

Target Audience:

Direction, Student, Middle Manager, Operational employee, Top Manager, HR, Worker, Individual, Designer, Marketing Officer, IT, Anyone

Objectives:

By the end of this course, participants will be able to use ChatGPT, Claude and Microsoft Copilot to analyse financial information, prepare reports and management summaries, improve financial communications and support day-to-day finance activities more efficiently while maintaining accuracy and confidentiality

Prerequisite:

Good knowledge of Office applications.

Methodologies:

Choose from our training methodologies :

- Face to Face Session (Seminar)
- 1-TO-1 Coaching

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Content:

Module 1: Understanding Artificial Intelligence in the Workplace

- What AI can (and cannot) do for finance professionals
- Overview of ChatGPT, Microsoft Copilot and Claude
- Choosing the right tool for the right task
- AI, data privacy and confidentiality at work

Module 2: Prompting Essentials

- Writing clear and effective prompts
- Giving context, role and output format to the AI
- Refining results through follow-up prompts
- Building a reusable prompt library for finance professionals

Module 3: AI for Analysis and Reporting

- Summarising financial data and reports with AI
- Drafting variance and performance commentary
- Getting help with Excel formulas using Copilot
- Explaining complex calculations in plain language
- Preparing first drafts of management summaries

Module 4: AI for Communication and Process

- Drafting emails to auditors, clients and management
- Documenting finance procedures and controls
- Preparing board and committee presentation content
- Turning raw notes into structured reports

Module 5: Responsible Use and Action Plan

- Accuracy risks: why every figure must be verified
- Protecting financial and client data when using AI
- Deciding which finance tasks are suitable for AI
- Verifying and fact-checking AI outputs