



# Crawl, Walk, Run with AI: A Practical Workshop for Finance Leaders

## Day 1 — Tool fluency

### **CRAWL**

Foundations

09:30 – 10:15 1.1 Two tools, two jobs

Mental model. What each tool is, isn't, and when to reach for which.

10:15 – 11:00 1.2 Company context intake CANVAS 1

Load context into Claude Project. Orient Copilot to your tenant files.

11:00 – 11:15 15 min Break

11:15 – 12:00 1.3 Prompting foundations

Three elements of an effective prompt. Live exercise — same task in both tools.

12:00 – 12:30 1.4 Responsible use & data hygiene

Data boundaries by tool tier. The 30-second test before pasting.

12:30 – 1:30 Lunch

### **WALK**

Function deep dives

1:30 – 2:15 2.1 Finance use cases

Copilot for the variances. Claude for the narrative. The two-step handoff.

2:15 – 3:00 2.2 Strategy use cases

Claude as thinking partner. Stress tests, competitor framing, initiative briefs.

3:00 – 3:15 15 min Break

3:15 – 4:00 2.3 Operations & cross-function

Inbox triage, meeting recaps, process diagnostics, hard communications.

4:00 – 4:30 2.4 Build your prompt library



## **Day 2 — Company-wide AI strategy**

### **RUN**

09:30 – 10:30 3.1 Imagine — North Star

Day 2 kickoff + vision before diagnosis. Where the business is heading and how AI fits.

10:30 – 11:00 3.2 Three strategic bets

From North Star to deliberate trade-offs. Three bets, each with an implied no.

11:00 – 11:15 15 min Break

11:15 – 12:15 3.3 PPDT capability gap

People, Process, Data, Technology — where you are vs where the bets need you to be.

12:15 – 12:30 3.4 Stress-test the gaps

Claude challenges your self-assessment before lunch.

12:30 – 1:30 Lunch

### **STRATEGIZE**

1:30 – 2:00 4.1 Initiatives & sequencing

Gaps become initiatives — PPDT-tagged, time-boxed, owner-named, with a first prompt.

2:00 – 2:30 4.2 Governance, policy & risk

AI use policy, risk register, approval gates, sector-specific obligations.

2:30 – 3:00 4.3 Operating model & change

Centralized, federated, or hybrid. Champions, training, expected resistance.

3:00 – 3:15 15 min Break

3:15 – 3:45 4.4 ROI model & vendor stack

Three measurement layers. Vendor stack with cost, tier, and data posture.

3:45 – 4:30 4.5 Comms plan & share-out CANVAS 4

Three audiences. AI Strategy synthesis. Two-minute share-outs. Workshop close.

4:30 Workshop concludes