20-day AI & GenAI Roadmap for Finance Managers

If you are a finance manager, this hands-on roadmap will help you harness AI and GenAI for tasks like financial forecasting, risk analysis, report automation, and internal process optimization.

#Week 1: AI & GenAI Fundamentals for Finance
Goal: Build foundational knowledge of AI/GenAI and identify use cases in finance.

Day 1: Intro to AI in Finance
* Watch: AI for Everyone
* Watch: Putting AI to work for finance
* Outcome: Understand AI's role in transforming forecasting, compliance, and decision-making.

Day 2: What is Generative AI?
* Watch: Introduction to Generative AI
* Hands-on: Use ChatGPT or Gemini to generate a financial summary from a news article.
* Outcome: Learn how GenAI can assist in summarizing earnings calls, reports, and economic trends.

Day 3: Prompt Engineering for Finance Professionals
* Read: Prompting Guide
* Prompt: "Summarize this earnings report in bullet points for a CFO."
* Outcome: Learn to design prompts that produce accurate and actionable financial insights.

Day 4: Automating Financial Analysis
* Task: Ask Perplexity AI "Summarize Tesla's financial performance in 2024 YTD."
* Outcome: Gain real-time financial insights in seconds using AI-powered research tools.

Day 5: Identify AI Use Cases in Your Workflow
* Watch: The Role of Data and AI in Finance
* Reflect: List 3 recurring finance tasks AI could improve or automate.
* Outcome: Spot immediate opportunities for productivity gains in your role.

#Week 2: AI for Reporting, Compliance & Data
Goal: Use AI to streamline reporting, detect risks, and analyze financial data.

Day 6: AI for Financial Reporting
* Watch: ChatGPT for Finance & Excel Automation
* Outcome: Automate summary reports and commentary from Excel data.

Day 7: AI and Excel
*Watch: Microsoft Copilot AI Boost Productivity in Word, Excel & PowerPoint!
* Tool: [Excel + ChatGPT Plugin (free tier via Microsoft 365 Copilot or ChatGPT Advanced)]
* Outcome: Use AI inside Excel to auto-clean, analyze, or visualize data faster.

Day 8: Fraud Detection and Risk Analysis
* Read: How AI Helps Detect Financial Fraud
* Task: Ask ChatGPT to "List common red flags in financial fraud analysis."
* Outcome: Understand how AI supports internal controls and fraud risk assessment.

Day 9: Automate Compliance Tasks
* Watch: How GenAI Helps with Financial Compliance
* Task: Summarize a recent change in IFRS or SEC regulation.
* Outcome: Stay ahead of compliance changes without manual research.

Day 10: AI for KPI Dashboards
* Tool: Google Looker Studio + ChatGPT
* Watch: Step-by-Step: Building a Looker Studio Dashboard for CFOs
* Outcome: Learn to set up auto-updating dashboards for key metrics.

#Week 3: Forecasting, Budgeting, and Planning
Goal: Integrate AI into core finance functions like forecasting, budgeting, and scenario planning.

Day 11: Financial Forecasting with AI
* Watch: Build forecasting models with Vertex AI
* Task: Use sample revenue data and ask: "Forecast next quarter's revenue based on trends."
* Outcome: Experiment with GenAI for trend analysis and projections.

Day 12: Budgeting with AI
* Watch: Getting started with Notion AI
* Task: Ask ChatGPT "Build a budget scenario with 5% revenue drop."
* Outcome: Create dynamic budget simulations without complex spreadsheets.

Day 13: Scenario Planning & Sensitivity Analysis
* Read: How AI is transforming strategy development
* Task: Use ChatGPT to simulate "best case, base case, worst case" outcomes.
* Outcome: Make faster what-if analysis using natural language.

Day 14: Using AI for Investment Analysis
* Watch: How I Analyze Stocks Like a Pro Using ChatGPT
* Ask: "Compare Apple vs. Nvidia's financials and 2025 outlook."
* Outcome: Accelerate investment-style analysis without spreadsheet digging.

Day 15: Build Your AI Finance Stack
* Watch: Build Your First AI Agent in 15 Minutes (NO CODING)
* Task: Set up bookmarks and templates you'll use daily.
* Outcome: Create a toolkit tailored to your finance workflows.

#Week 4: AI Strategy, Ethics, & Building Your Stack
Goal: Prepare for future AI trends in finance and build your personal tool stack.

Day 16: AI for Internal Controls and Audit
* Watch: AI for auditors
* Read: AI in Internal Audit
* Outcome: Learn how to reduce risk and audit effort using AI insights.

Day 17: Voice Assistants for Financial Search
* Read: The Rise of Voice Technology in Financial Services
* Task: Ask AnswerThePublic "What are CFOs asking about AI in budgeting?"
* Outcome: Stay ahead of what the C-suite is concerned with.

Day 18: Ethics and AI in Finance
* Watch: Ethical Implications in AI-Driven Finance
* Outcome: Ensure you're using AI responsibly, securely, and transparently.

Day 19-20: Final Project – Automate a Weekly Task
* Watch: How to Automate Your ChatGPT Prompts with Zapier
* Create a 1-slide summary of your tools and wins.
* Outcome: Position yourself as the AI-forward leader in your department.

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