Lesson 3: Tools and Technologies

Overview:
The choice of tools affects how effectively AI can be integrated into financial operations.

Key Points:
• Popular Tools: ChatGPT, BloombergGPT, Claude, Azure OpenAI
• Deployment Options: On-premise vs. cloud-based (AWS Bedrock, Azure)
• Integration: APIs to embed AI into internal systems

In-Depth:
Organizations must evaluate tools based on accuracy, cost, customization, and compliance needs.

Lesson 4: Implementation Strategies

Overview:
Rolling out generative AI requires thoughtful planning and phased adoption.

Key Points:
• Pilot Programs: Start with low-risk use cases
• Data Readiness: Clean and relevant datasets are essential
• Human-in-the-Loop: Oversight to validate AI outputs
• Change Management: Training teams to adopt new workflows

In-Depth:
An iterative and well-governed rollout ensures alignment with business goals and reduces operational risks.