**SPARK: Serrala Program for AI Readiness & Knowledge**

*Igniting operational AI innovation across Serrala*

**About SPARK**

**SPARK (Serrala Program for AI Readiness & Knowledge)** is a strategic enablement platform designed to scale operational AI capabilities across Serrala. It will empower teams across Treasury Services (STS), other consulting practices, and internal business functions to apply artificial intelligence in meaningful, high-impact ways. SPARK explicitly excludes product development activity, allowing for independent operational advancement without overlap with the Chief Product Officer’s remit.

SPARK will provide a unified structure for developing, branding, and scaling initiatives related to:

* AI tool creation
* Training content development
* Internal certification recommendations and reviews
* Curated video learning libraries
* AI prompt libraries and terminology glossaries
* Shareable internal knowledge assets

These contributions are proposed to be organized and made accessible through the **SAKES repository (Serrala AI Knowledge & Enablement Studio)**—a two-part platform containing:

* **Tooling & Automation Library**: Reusable workflows, dashboards, chatbots, and prompt templates
* **Learning & Reference Hub**: Video content, training guides, curated certification reviews, and onboarding resources

SPARK will serve as a collaborative backbone for enterprise-wide operational AI efforts under the leadership of Oliver Gallienne, COO, with strategic support from Peter Wolf, Managing Director of STS and Advisor to the Board on Operational AI. Some of the active initiatives that are expected to contribute to SPARK include the Microsoft Copilot Power User pilot and business case development initiative, the deployment of TheLoops AI platform in customer support, and STS-led projects such as AI-driven thought leadership content and real-time dashboard development.

As SPARK takes shape, we aim to identify additional initiatives across the organization and initiate conversations between currently engaged teams. The goal is to increase visibility into ongoing efforts, reduce duplication, and uncover immediate opportunities to share tools, learnings, and outcomes that can accelerate impact across Serrala.

SPARK’s mission is to help break down functional silos, increase cross-team visibility, and create a scalable system for operational AI adoption. By consolidating these efforts into a shared enablement structure, SPARK will enable teams across Serrala to access, adapt, and extend proven tools, resources, and learnings.

**STS Practice’s Role and Contributions within SPARK**

As an early and motivated participant in the SPARK initiative, the Serrala Treasury Services (STS) team—led by Peter Wolf—will play a foundational role in shaping the initial structure of the SPARK framework and in contributing content to the SAKES (Serrala AI Knowledge & Enablement Studio) repository. STS aims to serve as a proactive contributor and enabler, helping to drive visibility, structure, and alignment around Serrala’s operational AI efforts.

While various teams across the organization are pursuing important AI initiatives, many of these efforts today operate in relative isolation. STS is committed to helping bridge those silos by developing reusable enablement assets and proposing a unified framework that makes existing knowledge, tools, and learnings more visible and accessible across teams.

In addition to its own projects—such as AI-driven thought leadership content creation, prompt library development, reporting dashboard design, and workflow automation —STS is actively engaged in broader enterprise initiatives, including the Microsoft Copilot Power User pilot and business case definition. While not leading those efforts, STS is contributing enthusiastically and seeks to extend and complement such work by documenting approaches, sharing reusable outputs, and coalescing best practices into the SAKES repository.

This collaborative spirit reflects STS’s commitment to both accelerating its own AI maturity and supporting a more connected, scalable, and transparent operational AI ecosystem across Serrala.

**STS Contributions: Focus Areas and Enablement Tools**

1. **SAKES Repository**

* **Platform**: Microsoft SharePoint (internal)
* **Contents**:
  + Prompt libraries, code templates, project guides
  + Training resources, curated video playlists, glossary of terms
  + AI tool onboarding materials and certification overviews
* **Outcome**: Fully populated and scalable internal knowledge hub supporting SPARK and enterprise-wide operational AI enablement

1. **Large Language Models (LLMs)**

* **Tools**: ChatGPT, Microsoft Copilot
* **Activities**: Explore and apply prompt engineering to optimize LLM usage in operational workflows
* **Deliverable**: Prompt library of sample generative AI prompts aligned to treasury and finance tasks
* **Outcome**: A structured library of Copilot-ready documentation and generative AI prompt samples that can be leveraged and refined by other Serrala teams to accelerate their adoption and effective use of AI tools for their specific needs

1. **LLM Integration and Automation**

* **Tools**: Zapier, Microsoft Power Automate, ChatGPT API
* **Projects**:
  + Automate email-based content workflows for thought leadership and marketing collaboration
  + Aggregate and reconcile treasury data with minimal manual effort
* **Outcome**: Reusable automation templates and published documentation in SAKES

1. **Chatbots for Treasury Services**

* **Tools**: Microsoft Copilot Studio
* **Projects**:
  + Chatbots to assist internal teams and external clients with common treasury and operations FAQs
* **Outcome**: Integrated chatbot prototypes with user guides stored in SAKES

1. **Data Visualization and Dashboards**

* **Tools**: HTML, JavaScript, React, Tableau, Power BI (with Copilot)
* **Projects**:
  + Enhance analytics dashboards with predictive AI insights
  + Build real-time reporting dashboards for operational transparency
* **Outcome**: Live dashboards hosted internally and documented in SAKES

1. **Certifications & Training**

* **Tools**: YouTube, Coursera, and other online training and certification platforms
* **Activities**:
  + Recommend and review third-party AI certifications relevant to operational use
  + Curate training materials, video content, and overviews of each certification
* **Sample Certifications**:
  + Microsoft Certified: Azure AI Fundamentals (AI-900)
  + AWS Certified Cloud Practitioner
  + Zapier Expert Certification
  + Prompt Engineering (Coursera, Vanderbilt University)
* **Outcome**: Reviewed content logged in SAKES with summaries, curated playlists, and structured learning paths for internal teams

1. **Marketing & Visibility Enablement**

* **Coordination**: STS to collaborate with Serrala Marketing (led by Nancy Huang)
* **Messaging Channels**: Structured updates posted via internal channels and LinkedIn (as appropriate)
* **Example Messaging**:
  + “Serrala Treasury Services is redefining operational intelligence with AI-driven dashboards and Copilot automation workflows.”
  + “Transforming internal enablement through structured LLM training and curated AI certifications.”
* **Outcome**: Increased awareness of operational AI initiatives and team contributions across the organization and externally

**Value Proposition for Serrala**

* **Scalable AI Adoption:** SAKES (Serrala AI Knowledge & Enablement Studio) provides a structured foundation—including a tooling library and learning hub—that empowers other Serrala teams to adopt and scale AI with reduced onboarding time and support needs.
* **Operational Excellence:** Developed tools—chatbots, automations, dashboards, and terminology models—enhance STS workflows, improving efficiency in treasury management and client engagement, establishing templates, models, and frameworks for other consulting practices and operational teams within Serrala to leverage and accelerate adoption.
* **Brand & Talent Leadership:** LinkedIn content will position Serrala as a forward-thinking innovator in AI-powered treasury services and operational excellence.

**Governance of STS Participation in SPARK**

The governance of SPARK overall will reside with the Office of the COO. That said, the STS team would like to take a leading role in helping establish the foundational structure of the SPARK framework and the SAKES (Serrala AI Knowledge & Enablement Studio) repository. We are highly motivated to contribute meaningfully to SPARK’s early success and to help shape a scalable model for operational AI enablement across Serrala.

At the same time, we recognize that STS operates as a consulting organization, and our resources are primarily focused on supporting client projects and delivering billable work. As such, while we are enthusiastic and strategically aligned, our ability to fully drive this initiative will be dependent on available capacity and enterprise-wide coordination.

With that context, STS participation in SPARK will be led by Peter Wolf (Managing Director, STS; Advisor to the Board on Operational AI), with active support from Gilles Gilmart (Senior Manager) and Bart Borek (Manager), who will co-lead the STS AI initiatives.

The STS team proposes to serve as the initial implementation and content lead, responsible for:

* Establishing repository structure and content governance
* Ensuring alignment with non-product use cases
* Supporting onboarding and education efforts for internal business teams

Quality assurance and evaluation of STS deliverables will be led by Gilles, Senior Manager STS, and Bart, Manager STS, while Peter will oversee broader program alignment and report progress to the COO.

As SPARK matures, these early contributions will provide a reusable, scalable model for enablement across Serrala’s operational domains. SPARK will serve as the foundation for future learning and development initiatives across Serrala that support operational AI adoption, improve service delivery, and raise overall data and automation fluency within business teams.

**Next Steps**

To move forward with the proposed SPARK initiative, the following approvals and actions are recommended:

* **Executive Approval:** Formal endorsement from Oliver Gallienne, COO, is requested to proceed with the SPARK framework, including its branding, positioning, and the accompanying SAKES (Serrala AI Knowledge & Enablement Studio) structure. This approval will authorize STS to begin engaging with other participating teams to increase awareness of SPARK and coordinate knowledge sharing in preparation for populating SAKES.
* **Internship Program Review:** As part of this broader approval, Oliver’s review and sign-off is also requested for the AI Research & Development Internship Program, which is proposed as an official track under SPARK. A separate overview document has been prepared detailing the structure, goals, and intern learning path for this program.
* **HR and Legal Approval:** Review and approval from Serrala HR and Legal will be needed to validate the structure of the unpaid internship, including compliance with labor standards and alignment with internal policies.

Once these approvals are obtained, the STS team will begin contributing foundational enablement content to the SAKES repository and coordinating with other teams across Serrala to capture, document, and scale operational AI knowledge.

SPARK positions Serrala to transition from experimentation to execution—fostering a culture of visibility, enablement, and scalable AI excellence across the organization.