

Intro

My goal today is to encourage you to think about how AI can transform your organization.

We'll start with a simple framing — we divided AI opportunities into three buckets. As I speak, you may recognize these patterns in your own teams.

Slide 1 – Thought Starter for AI

This slide gives you a simple way to think about where AI might help. You don't need to know the tech — just whether your process fits one of these patterns.

1. General Productivity AI can save time on daily tasks like reading, searching, or writing — things that aren't complex but take up a lot of hours. Maybe someone's digging through policies or reports to find one line. Or drafting status updates or commentary that follow a familiar pattern. → Example: Chatbot to Answer Financial System Questions — Instead of emailing someone or checking multiple dashboards, just ask the bot.

2. Data Processing & Analysis This is where AI helps with structured work — validating, forecasting, flagging exceptions, or generating commentary. Maybe your team reviews forecast vs. actuals each month. Or models the impact of changes using the same logic every time. → Example: Scenario Modeling Layer on Forecast Data → Example: Allocations Impact Estimator → Example: Auto-Commenting or GRE Recs

3. Process Optimization This is about repeatable workflows that follow a known playbook — validate, format, escalate, route. Maybe there's a handoff process where humans apply the same rules over and over. → Example: Document Evidence AI (Co-Star, India) It starts with extracting key info from PDFs — but its real value is in automation. It validates against controls, feeds systems, or routes exceptions — turning a manual control into an AI-driven flow.

These aren't moonshots. They reflect work you already do — just done faster and with less manual effort. If a process is structured, repetitive, or logic-heavy, it's worth exploring.

Key words I want you to remember: Repetitive tasks, information lookups, evidence checking.

Slide 2 – Guiding Questions to Spot AI Opportunities

This second slide is even simpler. It's just a set of questions to help you spot opportunities in your own processes. You don't need to analyze anything. Just ask yourself — do we have processes that look like this?

- Do we manually manage lots of rules, validations, or exception logic? - Do people read through reports, emails, or attachments to pull information? - Do we reconcile or reformat data across tools, templates, or systems? - Do our inputs vary a lot — free text, inconsistent formats, mixed sources? - Are people making the same decisions over and over based on past experience? - Is this process repeated every month by a team of 5, 10, 20 people?

If you're mentally saying yes to a few of these, that's your signal. It doesn't mean we jump straight into a build — it means we tag it for a deeper look.

Key words I want you to remember: Repetitive tasks, cleaning and standardizing, information lookups, evidence checking.

Closing

And that's about it. I could spend 30 minutes or even an hour digging into this with you — but today you're getting the TikTok version.

You're a great team with a lot of on-the-ground knowledge. As you think through these questions in your day-to-day, we encourage you to connect with your manager with any ideas you may have for optimization — not just automation.

You don't need to know AI. You just need to know what slows you down. That's what I'm interested in — and we'll take it from there.