



Gen AI – FDH Experience Acceleration - Kickoff

Feb 11, 2025

5 Topics for today

- 1. Progressive GenAI investment** (Jason, Suhas)
- 2. FDH Progression and GenAI crossroads** (Mike H, Jeff G)
- 3. Roles and Associates – Commitments from Leads** (Preetesh, Suhas)
- 4. Use Cases** (Aradhana, Taylor)
- 5. Next Steps and Q&A** (Neeraja, Amitesh)



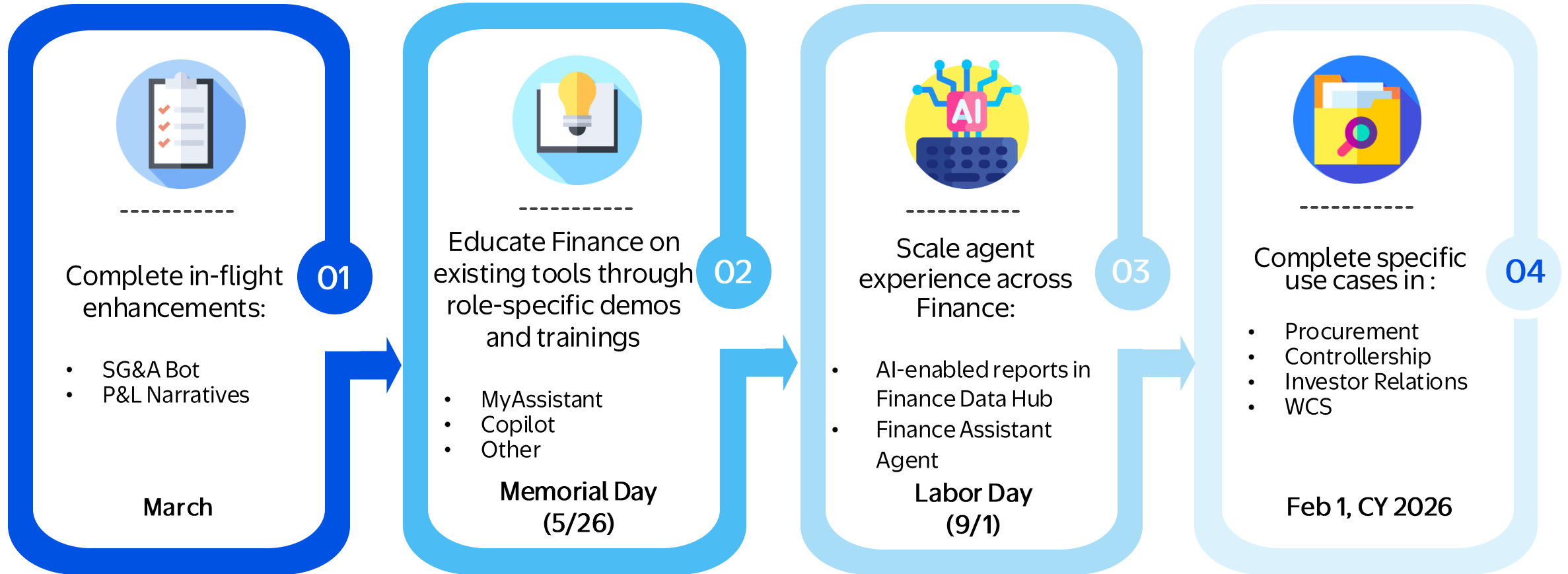
Generative AI – Where we've been

Delivering 8 use cases across Finance in FY25



Finance GenAI Strategy – Where we're going

Creating business value through generative AI in FY26




























































Maturity Steps

Finance Data Hub



Year 1 (Foundation)

Year 2 (Next Gen)

 Dashboard Intake	 Publication	 KPIs	 Touchless	 Contextual Metadata	 Self Service	 GenAi
<div> Me@ Accessible</div> <div> Access Management</div> <div> In-app Notifications</div> <div> Blackout List Checks</div> <div> Pause Reports</div> <div> Banner Notifications</div> <div> Publication Status</div> <div> Feedback/ratings</div> <div> Use case Filters</div> <div> Telemetry</div>	<div> Me@ Accessible</div> <div> Access Management</div> <div> Auto Generation</div> <div> Blackout List Checks</div> <div> Pre-validations</div> <div> Email Opt Out/In</div> <div> Historical Access</div> <div> Sync out</div>	<div> Personalized Watchlists</div> <div> Access Management</div> <div> KPI Drill Down</div> <div> Time Range Toggles</div> <div> Segment Filters</div> <div> Dimension Filters</div> <div> Generated Insights</div> <div> Sort by Relatives</div>	<div> Automated Refresh</div> <div> Validation</div> <div> E-mail Publication</div> <div> Historical status</div> <div> Anomaly Detection</div> <div> Auto-Error Handling</div> <div> Validation Warnings</div> <div> No-Code Setup</div>	<div> Ownership details</div> <div> SLA times</div> <div> Definitions</div> <div> Data Products Used</div>	<div> Access Management</div> <div> Blackout List Checks</div> <div> Pin to Canvas</div> <div> Publish Option</div> <div> Theme formatting</div> <div> Build from Dashboard</div>	<div> MyAssist Accessible</div> <div> Query to Open</div> <div> Summarizations</div> <div> Insight/Nudge</div> <div> Root Cause Analysis</div> <div> Initiate Support</div>

Resources

	Experience Layer + MyAssistant	Foundational Insights Agent + FDH Helper Agent	Daily Sales Agent	P&L Agent
	Jeff G + Michael H + Ambika S Roshni+TBD(Preetesh)+Jyoti+Sreejith Bob Kelley Jason Porter Meagan S			
Product Management	GenAI - Ambika Bhardwaj FDH - Michael H + Alex Bohl	Taylor LeSueur, Dhruv Kamath FDH - Michael H + Alex Bohl	Taylor LeSueur, Dhruv Kamath DST Data Foundation - Blake B	Taylor LeSueur, Dhruv Kamath P&L Data Foundation - Blake B
Architecture	Roshni+Jyoti+Sreejith			
Eng + Data Science	Roshni Som (+X)	TBD – Preetesh (+X)	Jyoti Anand (+X)	Jyoti Anand (+X)
Data Engineering	TBD	TBD	Sreejith Sreedharan (+X) Sridhar Swarna (+X)	Sreejith Sreedharan (+X) Sridhar Swarna (+X)
Data Steward	N/A	N/A	Meagan Strout Casey Allen	Meagan Strout Casey Allen
Report/Semantic Owners	N/A	N/A	Patrick Keehn	Patrick Keehn
UI/UX	Aradhana Venkat (+1.5) Andrew Riddle (+1.5)			
Business	Jason Porter	Jason Porter	WMT - Mike Tustison Consolidated - Marita Lawler Sams - Greg Ryner International - Nick Park	WMT - Mike T Sams - Matt Ingamells Rainbow P&L (Intl) - Nick Park Corporate – David Bates
PMO	Neeraja Batta			

What does GenAI in Finance Data Hub look like?



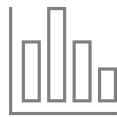
Insights at a glance

summarize



Data Q&A

chat



Custom visuals

chat



Support and guidance

chat



Key issue surfacing

generate



Personalized metric creation

generate



Use case 1:

Insights at a glance

summarize

Surfacing summaries for reports and KPI's on the metrics and report pages.

[Link to prototype](#)



Use case 2:

Data Q&A

chat

Chatting with the data powering reports and metrics.

[Link to prototype](#)



Use case 3:

Custom visuals

chat

Creating custom visualizations using
chat.

[Link to prototype](#)



Use case 4:

Support and guidance

chat

Using my assistant to answer finance questions like definitions, points-of-contact, and access.

[Link to prototype](#)



Use case 5:

Key issue surfacing

generate

Surfacing key data to get early visibility
on critical insights.

[Link to prototype](#)



Use case 6:

Personalized metric creation

generate

Creating personalized KPI cards
within chat.

[Link to prototype](#)



Features list in proposed scope for 8/31 - GenAI

Theme		Use Case	Scenario	
SUMMARY/ INSIGHTS	1	Summary/Insights	Ai summary/insights for Metrics	✓
			Ai summary/insights for Reports	✓
			Ai summary/insights for Report Summary (Publications)	✓
CHAT	2	Data through Q&A (CHAT)	Data Q&A for Metrics	✓
			Data Q&A for Reports	✓
			Data Q&A for Report Summary (Publications)	✓
	3	Custom visuals through Q&A (CHAT)	Q&A visuals for metrics	✓
			Q&A visuals for Reports	✓
			Q&A visuals for Report Summary (Publications)	✓
	4	Support and Guidance via Q&A (CHAT)	Support and Guidance for everything FDH	✓
GENERATE	5	Key Issue Surfacing	Notifications/Alerts/Highlights/Nudges	✗
	6	Personalized metric creation	Creating personalized KPI cards	✗

Ways of working and Structure forward

Sprint Process:

1.Product will setup and own **2 Grooming sessions**/month each hr. long. Ideally these need to be mid-Sprint and the focus being on next sprint and beyond.

Required Audience: Product, Scrum team(s), Scrum Master

2.Scrum Masters will setup and own following ceremonies as Scrum Master:

a.2 Sprint Planning sessions/month each hr. long. These need to be setup before the next sprint begins and the focus being on next sprint. The 1st45 minutes will be spent on grooming, story refining and clarification including acceptance criteria etc. The last 15 mins will be focused on story pointing. By the end of each planning session, the expectation is that the next sprint backlog is populated in Jira with the points included.

Required Audience: Product, Scrum team(s), Scrum Master

b.2 Sprint Demos/month each hr. long. These need to be setup after a sprint concludes and the focus being on next sprint.

Required Audience: Product, Scrum team(s), Scrum Master

c.2 Sprint Retros/month each hr. long. These need to be setup after a sprint concludes

Required Audience: ONLY Scrum team(s), Scrum Master

d.Daily standups (15 mins long)

Required Audience: Scrum Master, Scrum team(s), Product as Optional.

https://confluence.walmart.com/display/FP/GenAI+-Insights+Pro+Agents_FDH_GenAI+Acceleration+Program+Tracker

Appendix