



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



WMT Claims



Commercial Finance



Controllership/Tax

ClaimEasy Pro (\$1.5 to 3M)

Create concise claim summaries utilizing unstructured claim notes and claim facts with speed to expedite decision making.

Legal Summaries (\$1.5 to 3M)

Create concise claim summaries for the legal team by utilizing unstructured case manager notes and claim facts with speed to expedite decision making.

Severity Assessment (\$5 to 15M)

Utilize developing, real-time claim attributes to identify and classify high-exposure claims with speed.

IBG Explainability (\$1M)

Capability provides merch ops and merch finance understanding to the monthly ML forecast projection (e.g., driving factors, macroeconomic context, key metrics)

P&L Narratives (\$1 to 3M)

Generate insights and automated narratives to explain monthly KPIs, highlighting trends and identifying areas for improvement.

SG&A Agent (\$4 to 10M)

Generate trends, insight details, and narratives on home office cost center expenses to drive transparency and recommendations.

Lease Abstraction (\$2 to 3M)

Leverage Trillion GenAI capabilities to create lease abstractions across thousands of contracts, saving 2 to 12 hours per contract.

Tax (\$5 to 15M)

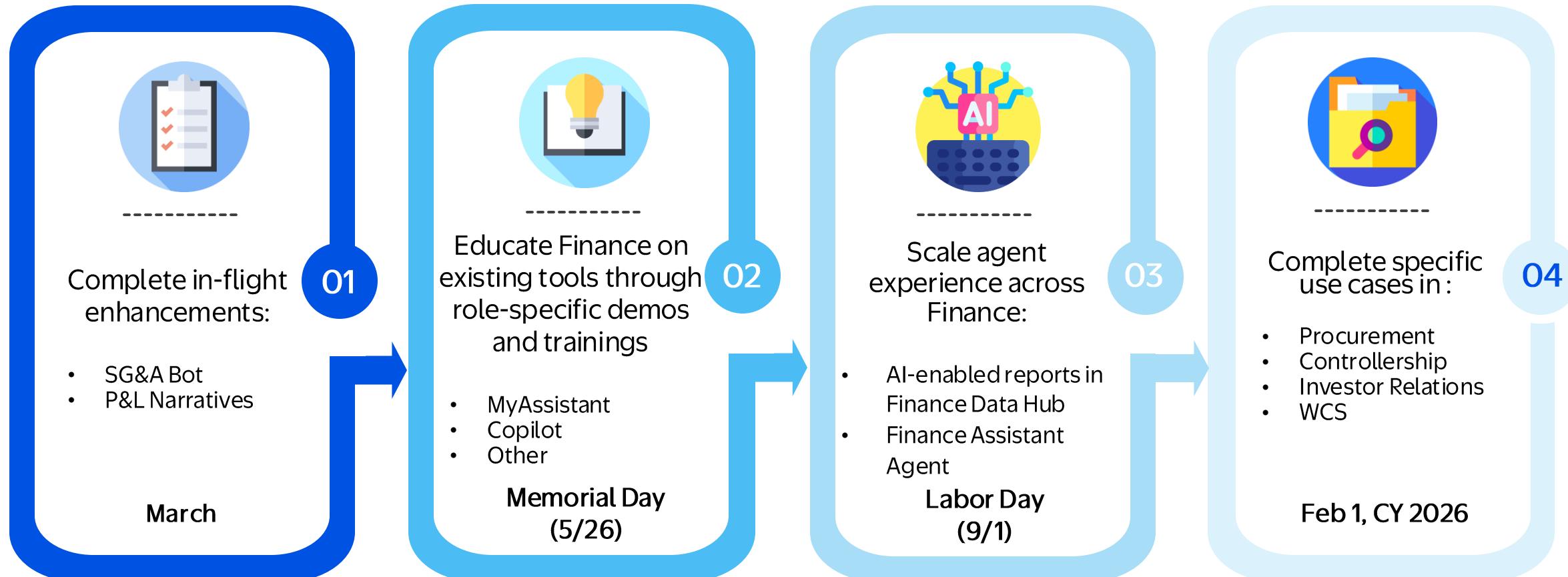
Ask questions of external regulatory environments to get answers quickly and make better decisions.



Finance GenAI Strategy – Where we're going



Creating business value through generative AI in FY26



Maturity Steps

Finance Data Hub



Year 1 (Foundation)



Dashboard Intake



Publication



KPIs



Touchless



Contextual Metadata



Self Service



GenAI

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

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Personalized Watchlists	Automated Refresh	Ownership details	Access Management	MyAssist Accessible
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Access Management	Blackout List Checks	Pin to Canvas	Publish Option	Theme formatting	Build from Dashboard

MyAssist Accessible	Query to Open	Summarizations	Insight/Nudge	Root Cause Analysis	Initiate Support

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
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?



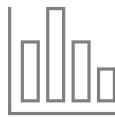
Insights at a glance

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 ✓
	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 1st 45 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