Faysal Aziz

Prompt Engineering

For finance: 1-day intensive workshop

FA-0370 · 1-day

Agentic & Generative AI

Introduction

Welcome to our transformative one-day training session designed to enhance productivity through the innovative use of ChatGPT and Gemini within the finance department. In the rapidly evolving landscape of finance, the integration of artificial intelligence (AI) and machine learning (ML) tools is no longer a futuristic concept but a present-day necessity.

These technologies offer unprecedented capabilities in analyzing large datasets, automating routine tasks, and providing insightful financial forecasts, thereby revolutionizing the way finance departments operate.

This course aims to equip you with the knowledge and skills to leverage ChatGPT and Gemini effectively, ensuring you stay ahead in the competitive world of finance.

Learning outcomes

By the end of this training, participants will be able to:

- Understand the fundamental concepts of AI and ML, focusing on ChatGPT and Gemini's roles in finance.
- Navigate and utilize ChatGPT for financial analysis, report generation, and customer service enhancement.
- Leverage Gemini for data visualization, predictive analytics, and financial modeling.
- Implement best practices for integrating ChatGPT and Gemini into existing financial workflows.
- Identify potential challenges and solutions in adopting these technologies in finance.
- Foster a culture of continuous learning and innovation within the finance department.

Prerequisites

Participants are expected to have:

- Basic knowledge of finance and financial terminology.
- Familiarity with data analysis and reporting tools.
- An understanding of the importance of AI and ML in the business context.
- A willingness to embrace technological advancements in financial operations.

Training outline

1. Introduction to AI and ML in Finance

1. Overview of AI and ML concepts.
2. Importance of AI and ML in modern finance.
3. Case studies highlighting the impact of AI and ML in financial departments.

2. Getting Started with ChatGPT

1. Introduction to ChatGPT: Capabilities and Limitations.
2. Setting up ChatGPT for financial tasks.

   Customizing ChatGPT for finance-specific queries.

   1. Understanding financial terminology through ChatGPT.
   2. Generating financial reports and summaries.
   3. Automating customer service and FAQs.
4. Variations in GPT 3.5 vs GPT4.x

3. Exploring Gemini for Finance

1. Introduction to Gemini: Data Visualization and Predictive Analytics.
2. Integrating Gemini with existing financial data sources.

   Creating dynamic financial models and forecasts.

   1. Building custom dashboards for real-time financial monitoring.
   2. Advanced analytics for market trends and risk assessment.
4. Variations in Gemini vs Gemini Advanced.

4. Practical Applications

1. Interactive workshops on setting up ChatGPT and Gemini for finance.
2. Hands-on exercises in financial report generation, data visualization, and predictive modeling.
3. Group discussions on innovative use cases in finance.

5. Best Practices and Considerations

1. Integrating ChatGPT and Gemini into existing workflows.
2. Data privacy and security considerations.
3. Managing change and encouraging adoption within finance teams.

6. Challenges and Solutions

1. Identifying common pitfalls and challenges.
2. Strategies for overcoming resistance to AI tools.
3. Maintaining accuracy and reliability in financial analyses.

7. Fostering a Culture of Innovation

1. Encouraging continuous learning and exploration of new technologies.
2. Best practices for staying updated on AI and ML advancements.
3. Creating a roadmap for future technology adoption in finance.

8. Wrap-Up and Q&A

1. Recap of key learnings.
2. Open floor for questions and personalized guidance.
3. Discussion on next steps and resources for further learning.

This comprehensive training is designed to empower you with the tools and knowledge to transform your finance department through the effective use of ChatGPT and Gemini. Engage with each session actively, and you'll emerge well-prepared to navigate the exciting intersection of finance and technology.

The trainer may not be following the sequence of topics listed but rather use an iterative approach to training.

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