THE 30-DAY AI FINANCE PLAYBOOK

by Nicolas Boucher



How to train your finance team on AI in 30 days

CFOs keep asking me:
“How do we skill the team on AI without chaos or risks?”

My answer:

- Pick one secure tool fitting your current environment
- Teach real use cases you can repeat
- Create an environment and platform where people learn from each other

Why this works:

We avoid “shadow IT” by selecting one approved AI inside their existing security perimeter (mostly Microsoft 365 or Google Workspace).

Then we run a **30-day enablement**: adapted use cases, hands-on prompts, custom finance agents, and I help them build an environment for sharing wins.

This structure consistently drives adoption.

Today I am sharing the exact playbook I use with 100s of finance teams when I upskill them on AI:

Step 1 — Week 0: Choose one tool and license everyone

Pick one AI platform that already lives in your security perimeter and give every Finance team member a license:

- **Microsoft shop → M365 Copilot (Business/Enterprise)**
- **Google shop → Gemini for Workspace**
- **Small team or scattered stack → ChatGPT Teams/Enterprise**

This single decision prevents shadow IT, keeps data in existing controls, and connects AI directly to your mail, files, calendar, and SharePoint/Drive.

⚠️ Important: in enterprise-grade plans (Copilot Business/Enterprise, Gemini, ChatGPT Teams/Enterprise), providers **do not train on your company data and is covered by at least a SOC 2 Type II level of security.** That's why I insist on enterprise licensing, not Plus/Pro.

Step 2 — Weeks 1–2: Run a 1-hour "Eye-Opener"

This kickoff is short, high-signal, and designed for busy finance people to get hands-on the same day.

This is where you need to break the belief that AI doesn't work for finance by showing real use cases.



Content outline:

- Live demos of use cases for Finance (FP&A, Accounting, Treasury)
- CSI–FBI prompting framework (Context, Specifics, Instructions, Format, Blueprint, Identity)
- Risks & limitations—what AI can and can’t do, and how enterprise plans mitigate risk
- Drafting long-form docs (policies, tax memos, executive briefs)
- Financial analysis workflows to get real analysis and insights from AI, not basic ones
- AI working for you on Excel for formulas, checks, and charts

When I give these webinars, I also explain how LLMs work and the difference between all of them (Copilot, ChatGPT, Gemini).

Step 3 — Week 3: Hands-on Workshop with your use cases

Next, we run a **2-hour, camera-on workshop** with exercises, Q&A, and breakout rooms.

Typical modules:

- Prompting for Finance (CSI–FBI + optimization)
- 5-Step Workflow for Financial analysis with reasoning models on real data from your company (using descriptive, diagnostic, predictive, prescriptive analysis with AI)
- Excel Models (AI builds KPI tabs, linked charts & formulas—not hard-coded numbers)
- Automations (Custom GPTs, Copilot Agents, Gems in Geminj)
- Breakout rooms to develop specific use cases
- Automating reporting with AI



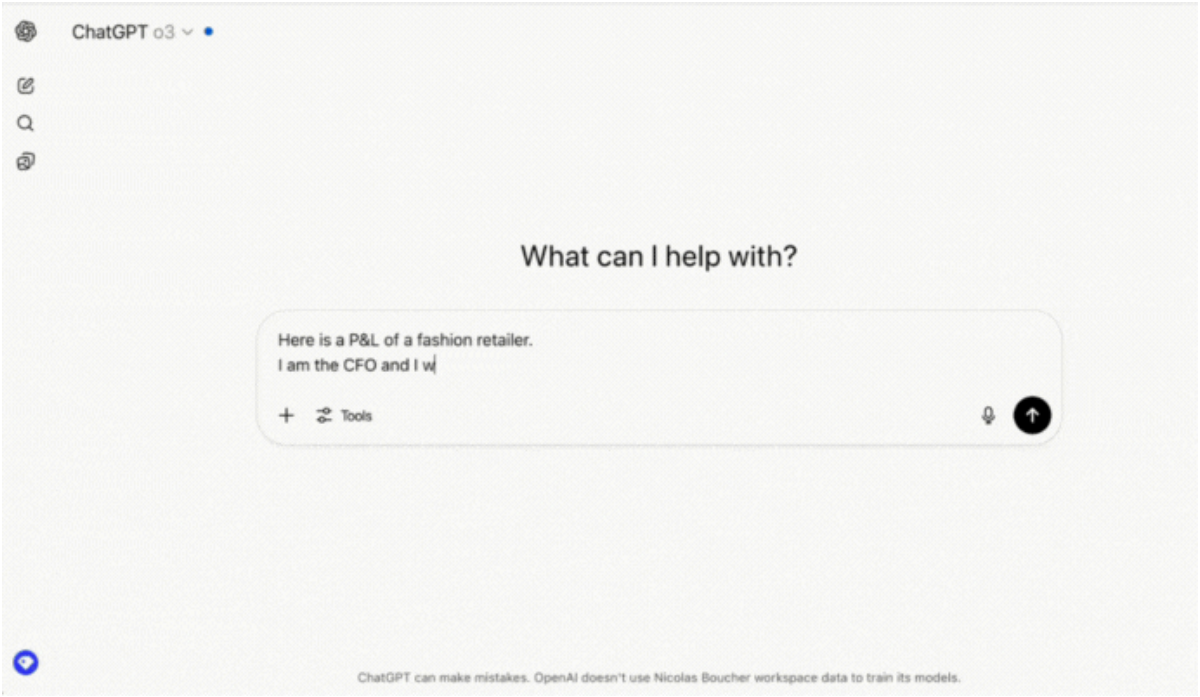
Participants leave with:

- Companion booklet
- Prompting Guide
- Full slide deck with extended examples

To give you an example, here is my **five-step workflow I teach for Financial Analysis**

1. Verify data
2. Propose analyses
3. Calculate
4. Build visuals
5. Write commentary

That’s how AI stops being a chatbot and becomes a reliable junior analyst.



Perform Financial Analysis with Data Visualizations

Step 4 — Week 3: Launch a Slack/Teams channel

On the same week, I help Finance teams open a dedicated #finance-ai-wins channel. If you want to do it yourself, the best is to set it up this way:

Pin three posts:

1. **House rules** (share sanitized snippets only; focus on AI topics only; small wins better than nothing)
2. **Use-case template** (Problem → Prompt → Output → Impact → Files/Links)
3. **Champion roster** (two power users per sub-team, reply <24h)

This prevents knowledge from going dark, keeps wins visible, and makes peer learning the default.

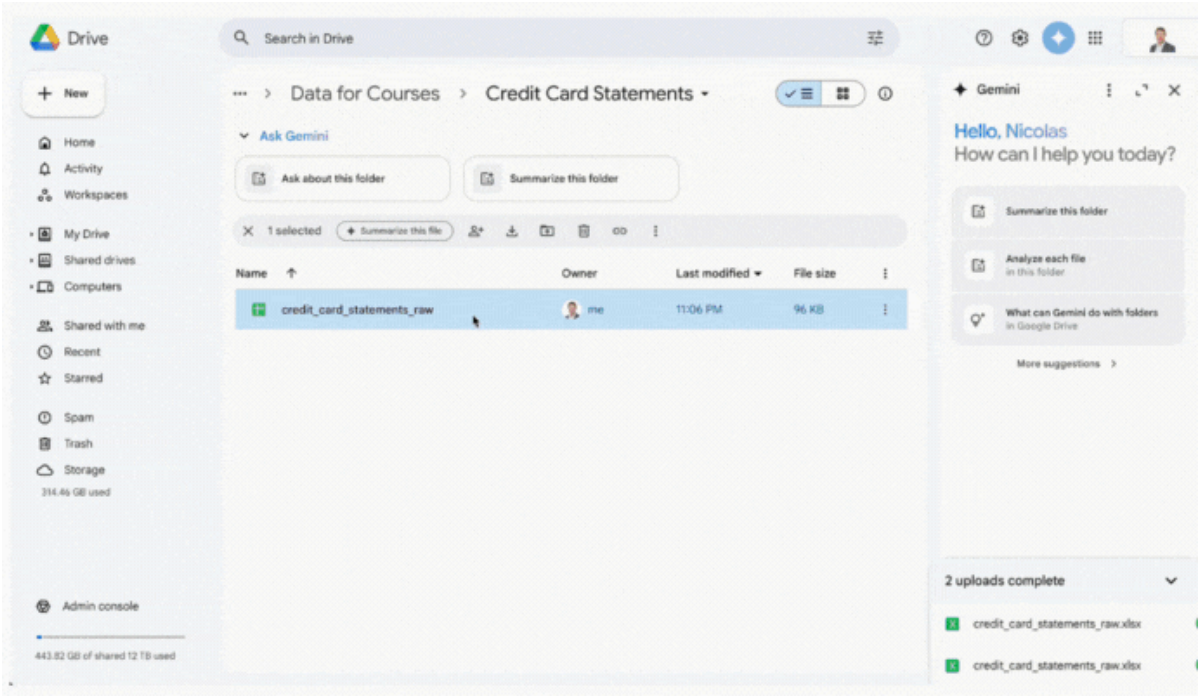
Step 5 — Every 2 weeks: Lunch & Learn

Lunch & Learn is a one-hour virtual or in-person meeting focused on exchanging, with almost no preparation needed, as only one person needs to present a use case.

Format: **20–30 min demo + 20–30 min Q&A.** Make sure to rotate presenters every time.

Example sessions:

- Automating data cleaning or the consolidation of 365 CSVs into one Excel file → showing how AI can help you set up Power Query, VBA, Python, Google or Office Scripts
- Spreadsheet → story: auto-generate executive one-pagers instead of formatting slides (using Canvas function in ChatGPT or Gemini)
- Variance commentaries: turn P&L tables into crisp 200-word CEO updates (drivers, quantification, next actions)



Automate Data Cleaning with Google Script

During this lunch and learn this is also the opportunity to discuss wins and measure their impact on **capacity & cycle time**, not just “hours saved.” Track:

- Time-to-first-insight
- Variance root-cause time
- Forecast turnaround
- Manual steps automated

The first win I see with AI: most teams reinvest saved time into deferred work—so productivity shows up as **throughput and quality.**

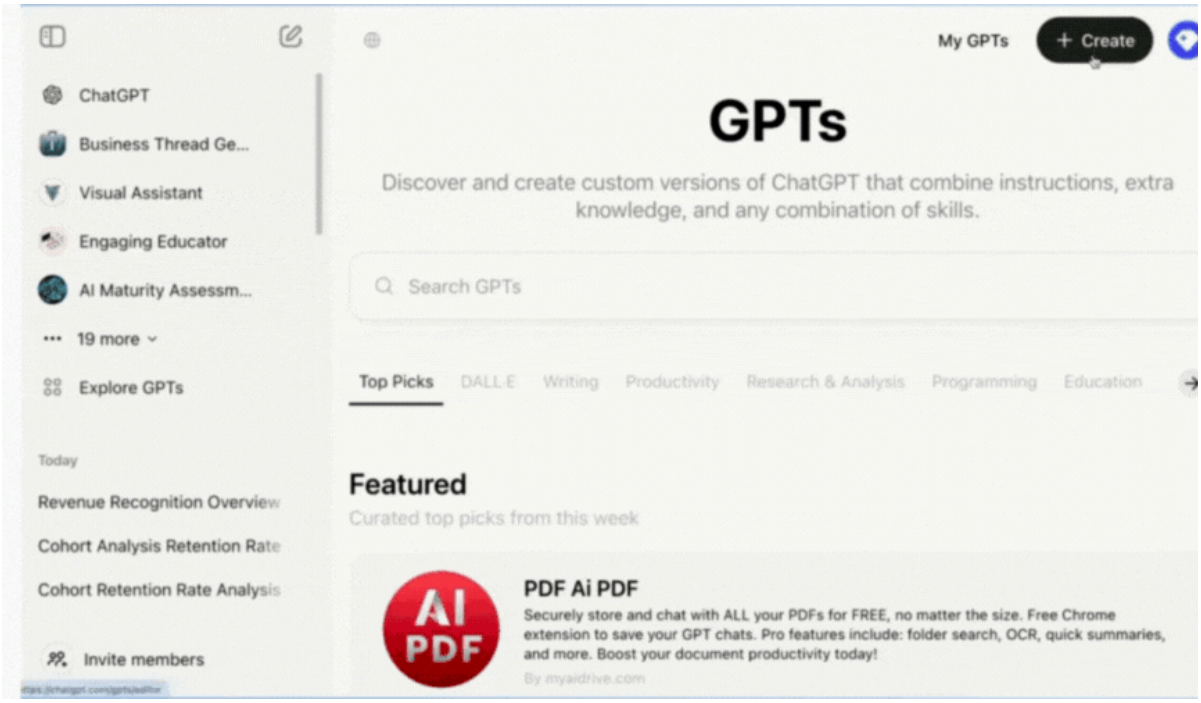
Step 6 — ~1 month after kickoff: Hackathon

Now that the team is fluent, run a **2-hour hackathon** to build agents.

Make it easy:

Ask your team to focus on these defining these three elements.

Name → Instructions → Knowledge (2–3 knowledge document or previous examples of what you want to automate).



How to create GPTs

Winning agents include:

- **Monthly Commentary Bot** (reads P&L/variance, outputs house-style summary + 3 actions)
- **Expense-Policy Q&A Bot** (answers approvals/forms from internal policy docs)
- **Presentation Builder** (drafts decks in brand voice from notes)

Agents can be demoed in Copilot, Gemini, or ChatGPT Enterprise—and shared org-wide.

Why this playbook works

After training 100s of Finance teams at Mercedes-Benz, KPMG, Rakuten, AWS and also at SMEs all over the world, this is why this playbook has results:

- Eliminates risk of shadow IT (one platform, licensed for everyone)
- Replaces “upload & pray” with structured workflows that show results bringing new insights
- Creates a **public pipeline of wins** (channel + Lunch & Learns) so adoption compounds
- Ends with **ownership**: your people build the first agents they’ll actually use

Case studies:

- At Rakuten (Barcelona), moving from “best prompts” to five-step workflows + reasoning models produced an immediate quality jump
- At Ferrero Headquarters, a structured workshop turned pain-point mapping into solution plans and short management pitches (in a single afternoon)
- At C&A, we launched a program for Finance to fully use Copilot and become the best in class in their group

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How can I help your team

You can run this playbook yourself, or if you need help, you can work with me.

Here’s what I deliver when you bring me and my team of AI Finance Experts in:

- **1-Hour Eye-Opener** (company-wide kickoff, tailored to your stack)

- **2-Hour Hands-on Workshop** (Finance use cases, exercises, take-home materials)
- **Slack/Teams setup** (templates + champion charter, plus Lunch & Learn runbook)
- **Agent Hackathon** (Custom GPTs, Copilot Agents, Gemini Gems - starter kits included)



(Bonus: ChatGPT vs Copilot vs Infographic comparison + Top 100 ChatGPT tips)

ChatGPT VS Copilot VS Gemini

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Best suited for...

Individuals and Small biz
Users wanting the best user interface and latest developments but whose work is not deeply integrated with Microsoft or Google

Microsoft Environment
Businesses whose workflows revolve around Microsoft 365 services particularly Word, Excel, Outlook, and Teams

Google Workspace
Users and businesses having their data mainly in Google Drive, Google Suite (G-Doc, G-Sheets) and Gmail

Featured Models

GPT-5: Smart and efficient model best for deep reasoning (GPT-5 Thinking) and research-grade intelligence (GPT-5 Pro)
GPT-4o: Fast, intelligent, and flexible legacy model

GPT-4.1 mini: Copilot's default model, fast, & intelligent
o3: Powerful model in research, thinks deeper (in agents)
GPT-5: Smart mode, better at reasoning & complex tasks

2.5 Pro: Gemini's most powerful thinking model
2.5 Flash: Their best model in terms of price-performance
2.5 Flash-Lite: Optimized for cost efficiency, low latency

Customized Assistants + Agents

Custom GPTs: Only available to paid users (Plus, Team, Enterprise); Free users can use CustomGPTs but cannot create them

ChatGPT Agent: Only available to paid users such as Plus (limited), Pro, Team, and Enterprise

Copilot Agents: Requires a Microsoft 365 Copilot Chat license; Agent builder is available through Copilot and Copilot Studio

Researcher & Analyst: Requires a Microsoft 365 Copilot license; specifically for researching and analyzing data

Gems: Requires a Google AI Pro/Ultra or Gemini Business/Enterprise/Education subscription

Gems can be used in the Gemini app and in the side panel of Workspace apps

What's included in the Free tier

- **Access to GPT-5 & GPT-5 thinking**: Limited availability (Switches to **GPT-5 mini** when limit is reached)
- **Limited file uploads:** Around 3 file uploads per 24-hour period, with support for spreadsheets
- **Custom GPTs:** Can only access pre-made GPTs
- **Limited image generation:** Limited availability
- **Deep research:** Limited availability, no priority

- **Basic Chat**: Limited usage & access to models during non-peak hours
- **Supports file upload**: One file upload at a time
- **Does not support** agent creation or usage
- **Basic image generation:** Limited generation
- **Unlimited Access to Think Deeper and Voice:** Slow at peak times, no priority for free users

- **Limited access to 2.5 Pro:** Exact limit is undisclosed (Switches to **2.5 Flash** when limit is reached)
- **10 files per prompt:** 2GB max for each video 100mb for other files. No support for spreadsheets
- **Gems:** Can create and use Gems, but is limited
- **General access Image Generation with Imagen 4**
- **Deep research:** Limited number of tasks with 2.5 Flash

What can you get with the paid plans?

Individual Plans

Plus($20/month)
Expanded access to GPT-5 & GPT-5 thinking
Faster response times, & expanded features:
- Voice conversations , Image generation with 4o
- File uploads and analysis
- Custom GPT creation
- Access to Deep Research and Connectors
- Limited access to ChatGPT Agent

Pro($200/month)
Includes all Team plan features, and
- Access to GPT-5 pro
- Expanded memory and Sora
- Extended context window
- Unlimited access to ChatGPT Agent

Microsoft 365 - Personal with Copilot ($9.99/month)
built into the Microsoft 365 Personal plan (one user) and below are AI-related inclusions:
- Productivity apps with Microsoft Copilot
- Designer AI-powered image creator and editor
- Priority access to newer models, faster performance
- Advanced security for your identity, personal data, and devices

Copilot Pro ($20/month)
Access via web, app, and on selected Microsoft 365 apps
- Extensive credits for AI usage on Microsoft 365 apps (Word, Excel, PowerPoint, Outlook, and OneNote)
- Priority access to AI models during peak times
- Access to Podcasts, Deep Research, and Actions

Google AI Pro ($19.99/month)
More access to capable models in Gemini App:
- Access to NotebookLM & Deep Research (2.5 Pro)
- Extensive Gems access and utilization
- Flow & Whisk (1000 monthly credits),
- Gemini in Google Apps; Gemini in Chrome (US)

Google AI Ultra ($249.99/month)
- Everything in Pro; higher Gemini App limit
- Exclusive Gemini 2.5 Pro Deep Think & Veo 3
- Early access to Project Mariner (agentic research)
- Highest limits:
  - Flow & Whisk (12,500 monthly AI credits)
  - Notebook LM
  - Gemini in Google Apps
  - Deep Research

Business Plans

Business ($25/user/month billed annually) or **($30/user/month billed monthly)**
Includes all Plus features, collaboration tools, admin controls, and shared GPTs
- Unlimited messages and bigger context window
- Unlimited and flexible usage of models

Enterprise (Custom Pricing)
Enterprise-grade security, admin tools, unlimited advanced models, highest context window, and fastest response time

Microsoft 365 Business + Microsoft 365 Copilot Bundle
for businesses availing plans with Copilot add-on
- Basic ($36): Copilot in web and mobile Microsoft 365 apps; AI-powered chat; up to 300 users
- Standard ($42.50): All of Basic; Copilot on web, mobile and desktop apps; Three additional apps
- Premium ($52): All of Standard; Enhanced security and management controls; Five additional apps

If you have existing subscription plans such as:
Business plans:
- Basic = $6, Standard = $12.50, Premium = $22.00, Apps = $8.25

Enterprise plans:
- E3 = $33.75 , E5 = $54.75 , F3 = $8

You can avail the Copilot add-on separately
- $30/user/month (annual)
- $31.50/user/month (monthly)

Google Workspace
- Starter ($6.30): Gemini App; Gemini Assistant in Gmail
- Standard ($12.60): All of Starter; Expanded Access to models and features in Gemini App; Extended Gemini in Gmail, Docs, Meet, and more; Access to NotebookLM
- Plus ($22): All of Standard; Enhanced security and management controls

Enterprise Plus (Custom Pricing)
Advanced admin controls and enterprise-grade data protections; AI Classification for Google Drive; Assured Controls & AI Classification available add-on

Core Integration Strengths

Native ChatGPT Connectors & Third-Party Integrations
Connect ChatGPT to thousands of apps with zero- to low-code platforms

Microsoft 365 Productivity Apps & Connectors
Microsoft 365 Copilot connectors on partner organizations

Google Workspace Apps & Third-Party Integrations
Connect Gemini to thousands of apps with zero- to low-code platforms

Data Security

Users can opt-out data sharing; Training off by default for Team/Enterprise/API data; SOC 2; SOC 2 Type 2; SOC 3; CSA-STAR; ISO/IEC 27017; ISO/IEC 27018; Complies GDPR and CCPA

Users can opt-out of data training; Training off by default for business tiers; SOC 1/2/3; ISO 42001 (AI-management); CSA-STAR; Complies GDPR, HIPAA, and EU Data Boundary

Users can opt-out data training; Training off by default for Google Workspace; Data protected of generated response in email or document; Complies GDPR and HIPAA; SOC 1/2/3

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100 CHATGPT TIPS

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FRAMEWORK

1	**CSI+FBI**	Context, Specific, Instruction, + Format, Blueprint, Identity
2	**AIDA**	Attention, Interest, Desire, Action
3	**CARE**	Context, Action, Result, Example
4	**TAG**	Task, Action, Goal
5	**RTF**	Role, Task, Format
6	**PAS**	Problem, Agitate, Solution
7	**RISEN**	Role, Instructions, Steps, End Goal, Narrowing
8	**SNAKE (to get the best Python code)**	Specify (file type), Notebook (Colab, Jupyter), Action, Key data, Structure
9	**STAR**	Situation, Task, Action, Result
10	**CRISPE**	Capacity, Role, Insight, Statement, Personality, Experiment
11	**APE**	Action, Purpose, Expectation
12	**BAB**	Before, After, Bridge
13	**SWOT**	Strengths, Weaknesses, Opportunities, Threats
14	**RICE**	Reach, Impact, Confidence, Effort
15	**OKR**	Objectives and Key Results
16	**PESTLE**	Political, Economic, Social, Technological, Legal, Environmental
17	**MOSCOW**	Must-have, Should-have, Could-have, Won't-have
18	**ABCDE**	Assess, Brainstorm, Create, Develop, Execute
19	**DMAIC**	Define, Measure, Analyze, Improve, Control
20	**CARR**	Challenge, Action, Results, Reflection
21	**PPP**	Progress, Plans, Problems
22	**SMART**	Specific, Measurable, Achievable, Relevant, Time-bound
23	**4P's**	Product, Price, Place, Promotion
24	**RODES**	Role, Objective, Details, Examples, Sense Check
25	**IRBA**	Instructions, Recursion, Benchmark, Additional Guidelines

SHORTCUTS

26	**Open new chat**	**Windows:** Ctrl + Shift + O	**Mac**: Cmd + Shift + O
27	**Place cursor in chat input**	**Windows:** Shift + Esc	**Mac**: Shift + Esc
28	**Copy last code block**	**Windows:** Ctrl + Shift + ;	**Mac**: Cmd + Shift + ;
29	**Copy last response**	**Windows:** Ctrl + Shift + C	**Mac**: Cmd + Shift + C
30	**Set custom instructions**	**Windows:** Ctrl + Shift + I	**Mac**: Cmd + Shift + I
31	**Toggle sidebar**	**Windows:** Ctrl + Shift + S	**Mac**: Cmd + Shift + S
32	**Delete chat**	**Windows:** Ctrl + Shift + Backspace	**Mac**: Cmd + Shift + Backspace
33	**Show all shortcuts**	**Windows:** Ctrl + /	**Mac**: Cmd + /
34	**Undo Action**	**Windows:** Ctrl + Z	**Mac**: Cmd + Z
35	**Redo Action**	**Windows:** Ctrl + Y	**Mac**: Cmd + Shift + Z
36	**Zoom In**	**Windows:** Ctrl + +	**Mac**: Cmd + +
37	**Zoom Out**	**Windows:** Ctrl - -	**Mac**: Cmd - -
38	**Reset Zoom**	**Windows:** Ctrl + 0	**Mac**: Cmd + 0
39	**Quit Application**	**Windows:** Alt + F4	**Mac**: Cmd + Q
40	**Submit input**	**Windows:** Enter	**Mac:** Enter
41	**Add a Line Break**	**Windows:** Shift + Enter	**Mac:** Shift + Enter
42	**Cycle through interface elements**	**Windows:** Tab	**Mac**: Tab
43	Browser-Specific Shortcut: **Close Current Tab**	**Windows:** Ctrl + W	**Mac**: Cmd + W
44	Browser-Specific Shortcut: **Search Within Tab**	**Windows:** Ctrl + F	**Mac**: Cmd + F
45	Browser-Specific Shortcut: **Reload ChatGPT**	**Windows:** Ctrl + R	**Mac**: Cmd + R
46	Browser-Specific Shortcut: **Mark Tab/Chat as Favorite**	**Windows:** Ctrl + D	**Mac:** Cmd + D
47	Keyboard Navigation in ChatGPT: **Scroll to Top**	**Windows:** Page up	**Mac**: Cmd + Up Arrow
48	Keyboard Navigation in ChatGPT: **Scroll to Bottom**	**Windows:** Page down	**Mac**: Cmd + Down Arrow
49	In Text Editors w/ ChatGPT Plugins: **Invoke ChatGPT Command**	**Windows:** Ctrl + Shift + P	**Mac**:Cmd + Shift + P
50	In Text Editors w/ ChatGPT Plugins: **Autocomplete Prompt**	**Windows:** Tab or Ctrl + Space	**Mac**: Tab or Ctrl + Space

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DATA

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51	**Convert Text to a Table**	Provide data in plain text and ask, "Turn this into a table format"
52	**Summarize Data**	Paste a dataset and ask, "Summarize this data into key points"
53	**Generate Excel Formulas**	Describe what you want to calculate, which data you have and ask for the formula
54	**Generate a CSV File Template**	Request, "Create a CSV format for tracking sales data"
55	**Extract Data Patterns**	Ask, "Extract specific patterns from this data"
56	**Create an Excel Table**	List the headers and the type of data you want inside. Then say "Generate file"
57	**How to create a Pivot Table**	Ask, "How would you structure a Pivot Table to analyze revenue by region?"
58	**Generate Conditional Formatting Rules**	Example: "Give me a rule to highlight all cells with a value greater than $1,000"
59	**Automate Tasks with VBA**	Example: "Write a VBA script to combine all tabs in one tab"
60	**Suggest Graphs or Charts**	Ask, "What type of chart should I use to visualize this data?"
61	**Turn Data into insights**	Provide raw data and ask, "Summarize this into a key insights report"
62	**Generate Slide Content**	Ask for bullet points, "Summarize this content into 3 slides for a presentation"
63	**Create a Financial Dashboard Outline**	Request, "Guide me in building a sales dashboard by region"
64	**Create a Gantt Chart Template**	ChatGPT can outline tasks, durations, and dependencies in a structured format
65	**Create Monthly Reports**	Example: "Draft a monthly performance report with the following data"
66	**Export Data to Excel**	ChatGPT can generate text structured as Excel-importable (e.g., CSV) data
67	**Detect Data Anomalies**	Provide a dataset and ask, 'Identify any outliers or inconsistencies in this data
68	**Generate Data Cleaning Steps**	Ask, 'What steps should I take to clean this dataset before analysis?
69	**Create Interactive Data Visualizations**	Request, 'Suggest interactive visualization tools for this dataset
70	**Compare Data Trends Over Time**	Provide time-series data and ask, 'Identify key trends and changes over time
71	**Recommend the Best Chart for Data**	Ask, 'What type of chart best represents this dataset?
72	**Generate Forecasting Models**	Ask, 'What forecasting methods can I use for this data, and how do I apply them?
73	**Transform Data for Better Analysis**	Request, 'Convert this unstructured data into an analysis-friendly format
74	**Create Automated Data Reports**	Ask, 'Generate a summary report from this dataset with key insights and visuals
75	**Translate Data Descriptions**	Example: "Turn this description into SQL queries or database schema"

ADVANCED

76	**Obtain image ID for similar images**	Utilize image processing for referencing or replication of formats, be specific about the id.
77	**Connect Gmail via Connectors**	Settings → Connectors → Gmail → Allow. Prompt: "Find unread emails I owe replies to"
78	**Create a GPT**	Explore custom GPTs or tailor responses for your specific needs
79	**Chain Prompts for Complex Tasks**	Break down tasks into smaller chunks and connect them with sequential queries
80	**Use Role-Playing**	Ask ChatGPT to "act as" a specific expert (e.g., CFO, developer, data scientist)
81	**Ask for Counterarguments**	Challenge outputs by requesting opposing views or alternative solutions
82	**Refine with Iteration**	Continuously refine outputs by asking for clarifications or adjustments
83	**Automate Tasks with APIs**	Integrate ChatGPT's outputs into workflows using tools like Zapier or APIs
84	**Request Visual Suggestions**	Ask for layouts, table designs, or graphical ideas to enhance presentations
85	**Generate Frameworks**	Example: "Provide a step-by-step framework for budgeting processes
86	**Analyze Sentiment**	Paste content and ask ChatGPT to determine its tone or sentiment
87	**Generate Markdown**	Example: "Format this text in Markdown for a README file"
88	**Create Powerpoint via ChatGPT**	Ask ChatGPT to create a Powerpoint (you can even say 16x9 or 4/3 for layout)
89	**Explore GPTs**	GPT Marketplace - search here before creating your own
90	**Simulate Conversations**	Practice interviews, sales pitches, or client interactions.
91	**Generate JSON or XML Outputs**	Example: "Convert this data into JSON for a database"
92	**Canvas functionality in ChatGPT**	Canvas opens in a separate window, allowing you and ChatGPT to collaborate on a project
93	**Custom Instructions**	Personalize responses by setting preferences for tone, or what it should know about you
94	**Projects functionality in ChatGPT**	Organize files and chats for personal use and manage work across multiple conversations
95	**Memory setting in ChatGPT**	Save key details for ongoing conversations for more context-aware responses
96	**Tasks functionality in ChatGPT**	Schedule tasks: Ex. Prepare monthly financial statements (Scheduled: 5th of each month)
97	**Socratic Prompting**	Using open-ended, probing questions to push the AI toward deeper thinking
98	**Agent Prompting**	Assigning roles or tasks , defining roles clearly for specialized outputs
99	**Meta-Cognition**	Instructing the AI to evaluate its responses for accuracy or coherence
100	**Team Prompting**	Collaborating with multiple AI models or personas to solve a problem.