AI for the Finance Leadership Team

Two hours for the people who have been told to do something about AI and have to answer for it. What changes structurally and what is a bolt-on. What happens to the ERP, the planning tool, and the reporting stack over the next three years. Native vendor agents versus third-party platforms versus your own governed workflows, and when each is right. The control model: how you let this near the ledger and what you say when the auditor asks. A 90-day plan that starts with two processes the roadmap already chose. The last twenty minutes are the harder question: whether an AI-native version of the finance function should be built alongside the existing one, and what that would take.

This is instructor-led, hands-on training. Trainees have access to a qualified instructor for the full duration, in the room or live online, and for questions by email for thirty days after.

LEARNING OUTCOMES

- A shared position on bolt-on versus structural, and on what the finance systems stack looks like in three years.
- A buy, build, or both decision framework: vendor-native agents, third-party platforms, or governed workflows your own people run.
- The control model in one page: read-only boundaries, approval gates, logs, and the line for the audit committee.
- A 90-day plan with the first two processes, their owners, and what leadership has to protect for it to happen.

OUTLINE · 2 HOURS (120 MINUTES OF INSTRUCTION)

1. 20 min **Bolt-on or structural**
   - What the mandate from the board or the owner actually asks for.
   - Why literacy training produces nothing without time protected for the first two processes.

2. 25 min **What happens to the stack**
   - The ERP stays. The spreadsheet layer shrinks. The planning and consolidation tools become filing cabinets with an API.
   - You build the reasoning layer; the platform stores, routes, matches, and certifies.

3. 20 min **Buy, build, or both**
   - Vendor-native agents, third-party agent platforms, your own governed workflows. Where each is right and what each costs.
   - For a finance team of ten to forty with no enterprise platform: governed agent, shared drive, approval email is the end state, not a stepping stone.

4. 25 min **The control model**

- Input, transformation, output, human check. Deterministic where it counts, AI where it helps, a person before anything posts.
- Worked example: the sub-ledger reconciliation, then the annual compliance report you automate last.
- What the auditor asks and the one-page answer.

5. 15 min **The 90-day plan**

- Two processes, two owners, the protected hours, the first review date.
- What the flagship and the agent course deliver into it.

6. 15 min **The harder question**

- Whether to build an AI-native finance function alongside the existing one, and what that would take over three to five years.

AUDIENCE AND PREREQUISITES

CFO, controller, directors of finance and FP&A, the finance systems lead, and whoever owns the audit relationship.

- Nothing. If the team has taken the flagship course, bring the roadmap.

DELIVERY, COST, AND PROVIDER DETAILS

DATES AND TIMES

One session of 2 hours. Start and end date and time are set with the employer at booking and shown on the quote.

DELIVERY METHOD

In-class at the employer's premises in Calgary, or virtual (live, instructor-led) on Zoom or Microsoft Teams.

NUMBER OF PARTICIPANTS

Minimum 8, maximum 12 per session.

COST PER PARTICIPANT

$625 CAD. Session total $5,000 CAD for up to 12 participants (minimum 8 billed). GST extra.

TRAVEL

None.

TRAINING CATEGORY

Business Process and Operations Management

INSTRUCTOR

Neil Perejma, Founder, 1113 Technologies

- Founder, 1113 Technologies Inc.; Principal, EPM ONE Consulting Ltd. (incorporated 2016)
- 20+ years delivering Oracle EPM Cloud and Hyperion finance systems, including hands-on training for every implementation
- Daily practitioner of Claude, Claude Cowork, and Claude Code for finance-systems automation since 2024

TRAINING PROVIDER

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ON COMPLETION

Each trainee receives a certificate of completion by name. The employer receives a paid invoice showing cost and payment date, and a letter confirming trainees and completion by name, the business day after the session. Trainee personal information for the grant application is submitted by the employer to the Alberta portal directly; 1113 Technologies does not collect it. Grant engagements are delivered and invoiced by EPM ONE Consulting Ltd.