

Generative AI for Accounts & Finance Professionals



pm-partners

**Generative AI
for Accounts
& Finance
Professionals**

COURSE PARTICIPATION
CERTIFICATE

ACHIEVEMENT



Course duration: 1 day

Generative AI for Accounts & Finance Professionals

A practical, hands-on course to transform productivity across finance operations.

This highly practical course equips Accounts and Finance professionals with the skills to use Generative AI and AI agents to automate routine tasks, improve accuracy, accelerate reporting, and enhance decision-making. Participants will work directly with AI tools to streamline financial workflows, produce insights faster, and reduce month-end pressure across their teams.

Objectives

By the end of the course, participants will be able to:

- Use AI tools to automate recurring finance tasks (AP, AR, reconciliations, month-end prep).
- Identify which workflows are best suited for AI-driven optimisation.
- Apply prompt engineering techniques specific to finance artefacts.
- Generate reports, commentary, insights, and dashboards using GenAI.
- Use AI agents to monitor compliance, controls, and exceptions.
- Understand risks: data privacy, security, ethics, and financial accuracy.



Key topics

- What is Generative AI? (finance lens)
- Benefits and limitations of AI in financial operations
- Data security, financial accuracy, IP, and ethical considerations
- Foundations of prompt engineering for finance workflows
- Iterative refinement using prompt logs and feedback
- Hands-on exercises across AP, AR, reporting, and compliance
- Designing an AI-ready finance process
- Building workflows with common AI tools (ChatGPT, Excel, Power Automate, ERP add-ons, etc.)

Key pain points addressed

The course directly helps learners tackle the top challenges in finance roles:

Manual Data Entry & Reconciliation

- AI invoice processing
- Automated 3-way matching
- Exception management
- Bank and ledger reconciliations with AI

Slow Month-End Closing Cycles

- Daily “pre-close” checking powered by AI
- Automated accrual suggestions
- Close checklist automation
- AI-generated supporting schedules

Reporting, Forecasting & Data Fragmentation

- AI-powered reporting and commentary
- Variance explanation generation
- Cashflow and budgeting forecasts using ML
- Data extraction and transformation with AI tools

Compliance, Audit & Risk Management

- Automated audit trail creation
- AI anomaly detection
- Policy and control monitoring
- Ethics and accuracy considerations

High Volume of Low-Value Queries

- AI finance helpdesk (Teams or Slack)
- Self-service status updates
- AI-guided processes (how-to, templates, steps)



Course delivery

This course is delivered live by one of our certified facilitators using a highly practical, structured format.

Participants will:

- Experiment with prompts and refine outputs iteratively
- Share insights and approaches
- Build a personal AI prompt log

Courses can be delivered:

- Face-to-face
- Virtually
- Customised for in-house finance teams

Learn more about our virtual training [here](#).

Who is this course for?

- Accounts Payable / Accounts Receivable Officers
- Finance Analysts & Management Accountants
- Financial Controllers & Payroll Officers
- CFO support teams
- Anyone involved in financial reporting, reconciliation, or compliance

Participants should:

- Have a basic understanding of accounting processes and financial systems.

BYOD REQUIREMENTS: This is an immersive hands-on course, so you will need to bring your preferred device to the training course. Your device will need to be equipped with a generative AI model that supports unlimited prompt entries. (e.g. Copilot, ChatGPT, Gemini, Claude).

PDUs Participants who have been awarded the Project Management Professional (PMP)[®] credential by the Project Management Institute (PMI)[®] are eligible to earn **7 PDUs** for their participation in this course (5 Ways of Working, 2 Business Acumen).

Participants holding any of the Project Management accreditations (CPPP/ CPPM/ CPPD) are eligible to earn **14 CPDs** for this short course.

Why learn with PM-Partners?

For over 25 years, PM-Partners has helped organisations uplift capability across Australia, New Zealand and South-East Asia. Our facilitators are experienced practitioners who combine real-world expertise with best-practice delivery methods. **We don't just teach AI. We show you how to apply it to create real learning impact.**

Because we turn your career goals into reality.

Poor project skills are consistently cited as a key reason for project failure. To be successful in project delivery, it's critical to invest in yourself and the capabilities of your team. This means setting clear goals and making a commitment to continuous improvement.

Certification and training is a critical part of this journey. But you need to know which foot to put forward, and when, to ensure you're heading in the right direction. That's where our expert guidance and support comes in.

Tell us where you want to go

At PM-Partners we start every conversation with the question, 'Where are you trying to go?' We then apply our expertise to show you exactly 'how' to get there.

We believe that having the relevant skills and methodologies is critical to delivery success, and ultimately career success. Depending on your aims, our team of professional development consultants will work closely with you to create a development pathway, or team training program, that aligns with your goals.

Helping to build capability for over 25 years

Our accredited programs provide certification and development across a range of globally recognised project management and delivery streams.

Each year, our expert facilitators train and certify more than 15,000 people throughout Australia, New Zealand and South-East Asia to best practice standards. All are highly qualified practitioners in their field, they draw from real-life scenarios and their own experience to add real value for individuals, teams and organisations.

Our promise to you

PM-Partners, is committed to providing industry leading education that is relevant, up-to-date and designed to meet your specific needs.

We offer qualifications in multiple disciplines, including key products in PeopleCert's best practice portfolio, such as ITIL®, PRINCE2® Project Management, PRINCE2® Agile Project Management, PRINCE2® Programme Management, Prince2® Portfolio Management, and P3O®; APMG's AgilePM®, AgileBA®, AgilePgM™, Lean Six Sigma, Managing Benefits and Change Management; as well as the Scaled Agile Framework® (SAFe®); and Business Analysis programs from The Australian Chapter of the International Institute of Business Analysis™ (IIBA®), to name a few.

To find out more about how we can help you or your organisation uplift their capability, contact the experts on 1300 70 13 14.



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Consultant

25

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customer results

15,000

people trained
annually

4

integrated
service lines

85,000

resources
globally

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experience of our
senior advisors

52%

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incorporate Agile

41

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programmes
delivered annually

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ASEAN

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of the top 200
ASX companies

16

best practice global
methodologies and
frameworks

99%

first time
pass rate for
certifications



PM-Partners have been leaders
in training and professional
certification for over 20 years.

Our trainers are highly qualified
practitioners in their chosen fields.



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