

Live Prompt Input

You are an L&D and AI transformation architect supporting a **financial services organization** designing a **90-day AI upskilling program**.

Company Context

Meet **Aurelius Financial Group**.

- Mid-sized financial services company (~5,000 employees)
- Operates across multiple regions
- Technology stack:
 - Cloud: Azure
 - BI: Power BI
 - AI tools: Internal LLM pilot, Microsoft Copilot
 - LMS: Workday Learning

Aurelius does not lack tools, but lacks **shared AI capability**.

Leaders are experimenting informally, data teams are overwhelmed, and compliance concerns are slowing innovation.

Leadership Mandate

“Enable AI across the business — **without increasing risk or headcount**.”

The business outcomes leaders care most about are:

- Faster forecasting
- Reduced manual analysis
- More confident decision-making
- Responsible AI usage at scale

Task

Design a 90-day AI upskilling program by:

Step 1:

1. Defining a **clear Strategic AI Vision** that can realistically be supported within 90 days.

Step 2

1. Using the following personas, define **role-specific AI skill focus areas** (AI-specific, not general data skills):
 - Business Leaders
 - Citizen AI Practitioners
 - AI Practitioners
 - AI Experts
2. Identifying **key roles within each persona** that will drive adoption and success.
3. Defining **foundational AI knowledge and learning themes** suitable for a 90-day foundational program.

Step 2

1. Frame ROI for finance, data, and HR leaders, such that the AI vision and the learning program outlines executive-ready success metrics

Guardrails

- Ensure recommendations align with **responsible, compliant AI usage** in financial services
- Focus on **enablement and governance**, not experimentation alone
- Keep scope realistic for a **90-day foundation**, designed to enable long-term success

Present the output in a **clear, executive-ready structure**.

Live Prompt Output

Aurelius Financial Group

90-Day AI Enablement & Upskilling Program

Mandate: Enable AI across the business — responsibly, at scale, and with measurable impact.

Design Principle:

This is **not an experimentation program**. It is a **capability activation program** focused on decision quality, productivity, and governance.

Step 1 — Strategic AI Vision (90-Day Realistic Scope)

Strategic AI Vision

“Within 90 days, Aurelius will establish a shared, governed AI capability that enables leaders and teams to use AI confidently for forecasting, analysis, and decision support — without increasing compliance risk or operational load.”

What This Vision Does (and Does Not) Mean

This means:

- AI is used **consistently** across business, finance, and operations
- Decision-making is **augmented**, not automated
- AI usage follows **clear guardrails**, not ad hoc experimentation
- Data teams shift from firefighting to **enablement**

This does NOT mean:

- Building new AI models from scratch
- Replacing core financial processes
- Broad automation of regulated decisions
- Expanding headcount or tooling

90-Day Strategic Outcomes

By Day 90, Aurelius will have:

1. **A shared AI operating model** (who can do what, with which tools)
2. **Role-specific AI capability** across leaders, analysts, and practitioners
3. **Documented responsible AI guardrails** embedded in workflows
4. **Demonstrable business value** in forecasting, analysis, and decisions

Step 2 — Role-Based AI Capability Design

Persona Model (Aligned to Aurelius Reality)

Persona	Purpose
Business Leaders	Set direction, demand value, ensure responsible use
Citizen AI Practitioners	Use AI to accelerate analysis and decisions
AI Practitioners	Build, integrate, and operationalize AI solutions
AI Experts	Govern, secure, and scale AI responsibly

1. Business Leaders

Key Roles

- Executive Committee
- Finance Directors
- Regional & Business Unit Heads
- Risk & Compliance Leadership

AI Skill Focus (Leader-Specific)

- **AI-augmented decision-making** (forecasting, scenario analysis)
- **Interpreting AI outputs confidently** (limits, bias, uncertainty)
- **Setting AI demand** (what to automate vs. augment)
- **Responsible AI accountability** (model risk, data usage)

Foundational Learning Themes (90 Days)

- What AI *can and cannot* do in financial services
- How Copilot & internal LLMs support forecasting and analysis
- AI risk categories (model risk, data leakage, regulatory exposure)
- Leader responsibilities in AI governance

Success Signal

- Leaders ask **better AI questions**, not “Can AI do this?”
- Forecast and decision reviews explicitly reference AI inputs
- Reduced escalation to data teams for basic analysis

2. Citizen AI Practitioners

Key Roles

- Financial Analysts
- FP&A teams
- Operations Analysts
- Risk & Compliance Analysts
- Product & Commercial Analysts

AI Skill Focus

- **Prompting for financial analysis & insight**
- **AI-assisted forecasting and variance analysis**
- **Automating repetitive analytical workflows**
- **Validating AI outputs responsibly**

Foundational Learning Themes

- Using Copilot & internal LLMs for:
 - Forecast assumptions
 - Variance explanations
 - Management commentary drafts
- Prompt patterns for financial analysis
- Human-in-the-loop validation
- Data sensitivity & compliance rules

Success Signal

- Measurable reduction in manual analysis time
- Analysts produce faster, more consistent insights
- Fewer “one-off” data requests to central teams

3. AI Practitioners

Key Roles

- Data Analysts
- BI Developers (Power BI)
- Analytics Engineers
- Automation Specialists

AI Skill Focus

- **Embedding AI into existing workflows**
- **Power BI + AI integrations**
- **LLM-assisted analytics pipelines**
- **Operationalizing AI responsibly**

Foundational Learning Themes

- AI-enabled analytics architecture (Azure-aligned)
- Prompt engineering for analytics use cases
- Monitoring AI output quality
- Documentation & auditability

Success Signal

- Faster delivery of analytics solutions
- Fewer rework cycles due to unclear AI usage
- Clear documentation of AI-supported outputs

4. AI Experts

Key Roles

- Data Science Leads
- AI Platform Owners
- Security & Privacy Leads
- Model Risk & Governance Teams

AI Skill Focus

- **AI governance frameworks**
- **Model risk management for LLMs**
- **Data privacy & security controls**
- **Scaling AI responsibly**

Foundational Learning Themes

- Responsible AI in regulated environments
- AI usage policies & enforcement
- Monitoring drift, bias, and misuse

- Enabling the business without bottlenecks

Success Signal

- Clear, adopted AI usage policies
- Reduced “AI anxiety” across the business
- Governance enables speed instead of blocking it

Step 3 — Executive ROI & Success Metrics

Finance Leadership ROI

What improves:

- Faster forecasting cycles
- Reduced manual reconciliation & analysis
- More consistent management reporting

Metrics:

- ↓ Forecast cycle time (target: 20–30%)
- ↓ Manual analysis hours per forecast
- ↑ Forecast confidence scores (leader surveys)

Data & Technology Leadership ROI

What improves:

- Reduced ad hoc requests

- Better self-service analytics
- Clear AI usage boundaries

Metrics:

- ↓ Data team support tickets
- ↑ Adoption of governed AI tools
- ↓ Shadow AI usage

HR & People Leadership ROI

What improves:

- Workforce readiness for AI
- Reduced AI fear & misuse
- Future-proofed roles

Metrics:

- % of workforce AI-enabled by persona
- AI confidence & capability scores
- Reduced training fragmentation

Responsible AI & Compliance Guardrails (Embedded)

This program **builds governance into enablement**:

- Clear **AI usage tiers by role**

- Mandatory **human-in-the-loop validation**
- Explicit **data sensitivity rules**
- Audit-ready documentation of AI-assisted outputs
- Alignment with model risk management practices

Why This Works in 90 Days

- Leverages **existing tools** (Azure, Copilot, Workday Learning)
- Focuses on **capability, not experimentation**
- Aligns learning to **real workflows**
- Creates **shared language and standards**
- Sets a foundation for long-term AI maturity

Final Executive Message

**In 90 days, Aurelius will not “do AI pilots.”
It will operate with AI — confidently, responsibly, and at scale.**

If you'd like, I can next:

- Map this into a **90-day phased roadmap**
- Design **learning journeys per persona in Workday Learning**
- Create an **AI governance + enablement operating model**
- Define **example use cases for forecasting & FP&A**

Just tell me where you want to go next.