

AI Training for Finance Professionals

AI WORKSHOP SWITZERLAND

From financial analysis to investor reporting and client communication - apply AI to the work that takes the most time in Swiss finance teams.

Switzerland's finance sector is under pressure to move faster, report more clearly, and serve clients better - all with the same or fewer resources. AI can help, but finance teams need a practical approach that fits audit-ready standards, regulatory constraints, and the judgment-heavy nature of financial work. This workshop is built for that reality.

Built for finance & banking teams

Audit-aware approach

In-person or hybrid

Templates + prompt library included

1-Day In-Person Workshop

Corporate training · Switzerland

GDPR & Swiss FADP aware

aiworkshop.ch



Built for **Swiss teams**

Hands-on corporate AI training delivered on-site across Switzerland — with governance, templates, and adoption built in.

WHO THIS PROGRAM IS FOR

- Finance managers, controllers, and CFO teams managing reporting cycles
- Private banking and wealth management relationship managers
- Financial analysts and investment teams handling research and commentary
- Treasury, risk, and compliance teams with high documentation needs
- Finance business partners supporting operational departments across the business

WHAT MAKES THIS FINANCE PROGRAM DIFFERENT?

Finance is a field where accuracy is non-negotiable. This workshop focuses on AI as an accelerator for the communication and documentation layers of finance work - not as a substitute for financial judgment. Every use case is designed with audit-readiness and data governance in mind.

THE FINANCE CHALLENGES WE ADDRESS

REPORTING BOTTLENECKS

Monthly, quarterly, and board reporting takes enormous effort. AI helps structure, draft, and review financial narratives faster - without losing the accuracy standards finance teams require.

ANALYSIS DOCUMENTATION TIME

Translating data into clear, decision-ready commentary is slow. AI helps turn numbers into structured narratives and management summaries much faster.

CLIENT COMMUNICATION VOLUME

Relationship managers and advisors spend significant time drafting client updates, proposals, and follow-ups. AI accelerates this while maintaining the tone your clients expect.

REGULATORY & COMPLIANCE DOCUMENTATION

FINMA, MiFID II, and internal compliance requirements generate significant documentation work. AI helps maintain standards while reducing the manual effort.

YOU WILL LEAVE WITH REAL DELIVERABLES:

- Finance Prompt Library (reporting, analysis, client comms, board packs)
- AI Data Governance Guardrails for Finance Teams
- Financial Narrative Drafting Templates
- Client Update & Proposal Communication Templates
- 30-Day AI Adoption Roadmap for your finance function

DELIVERY

On-site at your office or venue · English, German, French, Italian · Zurich, Geneva, Lausanne, Basel, Bern, and nationwide.



Program Overview (1-Day In-Person Workshop)

Module 1 of 2 — practical exercises, real workflows, and reviewable outputs.

Program Overview (1-Day In-Person Workshop)

Group size: 8–15 participants (best for interaction) · Format: finance-specific use cases + live demos with real data workflows · Tools: ChatGPT, Microsoft Copilot (Excel, Word, Teams), data analysis integrations

Module 1 - AI Foundations for Finance Professionals

- How AI models work and where they introduce risk in finance
- Data privacy, confidentiality, and what not to share with AI tools
- Output verification habits: when to trust and when to check
- Regulatory considerations for AI use in financial services

Outcome: *Your team uses AI with financial-grade accuracy standards and appropriate oversight.*

Module 2 - Financial Reporting & Management Commentary

- Structuring monthly and quarterly management reports faster
- Drafting financial narratives from structured data
- Board pack commentary: clear, concise, decision-ready
- Reviewing and improving existing financial reports

Outcome: *Reporting cycles that take days compressed into focused hours.*

Module 3 - Analysis Documentation & Research Summaries

- Turning financial model outputs into readable analyst commentary
- Synthesizing market research and economic updates into briefings
- Competitive intelligence summaries for investment decisions
- Peer and sector comparison documents

Outcome: *Analysis outputs that communicate clearly to non-finance stakeholders.*



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Module 2 of 2 — practical exercises, real workflows, and reviewable outputs.

Module 4 - Client Communication & Relationship Management

- Drafting personalized client portfolio updates
- Investment proposal and recommendation letter templates
- Meeting follow-up notes and action summaries
- Clear, accessible financial explanations for private clients

Outcome: *Higher-quality client communication produced in significantly less time.*

Module 5 - Compliance Documentation & Operational Efficiency

- Structuring compliance reports and regulatory filings
- Policy document drafting and simplification for internal teams
- Audit trail documentation patterns
- Identifying repetitive finance tasks candidates for AI support

Outcome: *Less time on documentation, more time on value-adding finance work.*



Book this **workshop**

Request a tailored quote for your team size, location, and objectives.

Can we use AI with confidential financial data in Switzerland?

We address this directly. The workshop covers what to share, what not to share, and how to verify that your Microsoft 365 tenant or OpenAI Enterprise environment meets your institution's data residency and confidentiality requirements.

Is AI accurate enough for financial reporting and audit trails?

We teach 'Audit-Aware AI'—where AI is used for structuring and drafting narratives, while calculation and verification remain in your controlled ERP or spreadsheet environment. Every output requires a human review step.

Does this work with Microsoft 365 and Excel Copilot?

Yes. We have a dedicated focus on Microsoft Copilot for finance, covering Excel for data insights and narrative generation, Word for reporting, and Teams for coordination—the standard approved environment for many Swiss institutions.

Is this relevant for private banking and wealth management?

Absolutely. We have a specific track for private banking covering client communication, portfolio update drafting, KYC/AML documentation support, and personalised investment proposal workflows.

What ROI can a finance team expect after this training?

Most teams report a 30–50% reduction in time spent on narrative drafting for monthly and quarterly reports, and measurably higher quality in client correspondence within the first month of adoption.

PRIMARY

Request a quote

<https://aiworkshop.ch/form/quote/>

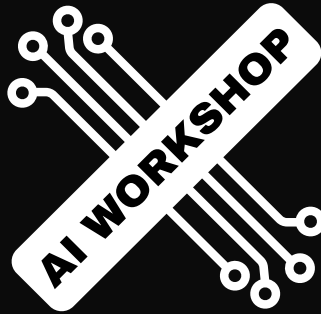
LEARN MORE

Workshop page

<https://aiworkshop.ch/workshops/ai-for-finance/>

CONTACT

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Train your team. Ship with confidence.

AI WORKSHOP SWITZERLAND

AI Training for Finance Professionals

Corporate AI workshops, executive coaching, and governed agentic systems for Swiss enterprises.

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