

AI Applications in Finance: Hands-on Workshop on Generative AI & Automation for Financial Decision-Making & Risk Management

10 December 2025 10:00 AM - 10 December 2025 05:30 PM

Brief Overview:

**AI Applications in Finance: Hands-on Workshop on Generative AI & Automation for
Financial Decision-Making & Risk Management**

Date :Wednesday, 10th December 2025

Time : 10:00 AM - 5:30 PM

Venue : Madras Management Center, Chennai.

Session content:

- **Introduction**

Practical AI Applications in Finance: MMA's Specialized Hands-on Workshop.

Madras Management Association welcomes you to the flagship workshop crafted exclusively for finance professionals across Industries.

This hands-on workshop on AI in Finance is designed specifically for industrial finance professionals eager to harness the transformative power of artificial intelligence in their work. Participants will gain a comprehensive understanding of core AI concepts, develop practical skills in using **AI tools for financial data analysis**, and learn how to leverage **generative AI for automating financial reporting and decision-making**.

Through real-world case studies, interactive exercises, and guided group work, the workshop will equip attendees with actionable knowledge to enhance forecasting accuracy, risk management, fraud detection, and financial communication. By the end of the day, participants will be prepared to confidently integrate AI technologies into their finance workflows, driving efficiency, innovation, and strategic impact in their organisations.

Key Takeaways

- **A clear understanding of fundamental AI concepts and how they specifically apply to financial functions such as forecasting, fraud detection, risk assessment, and**

automation.

- Practical experience with AI tools for analysing financial data, including data preprocessing, anomaly detection, and building predictive models, empowering participants to leverage AI for more accurate and efficient decision-making.
- Hands-on exposure to generative AI applications in finance like automated report generation, scenario analysis, and investor communication, demonstrating new ways to enhance productivity and insight generation.
- Insights from case studies and group exercises illustrating the real-world impact of AI on credit scoring, risk management, and ethical considerations surrounding AI use in finance.
- An appreciation of AI as a strategic business transformation driver in finance, highlighting best practices for integration, collaboration between finance and technology teams, and continuous learning paths for AI adoption.
- Awareness of challenges such as data quality, bias, and regulatory compliance, equipping participants to navigate risks while maximizing AI's benefits in their finance roles.

Section 1: AI Basics for Finance – Zero Jargon, 100% Useful

(Pure basics + prompting + quick wins)

- How to talk to AI effectively (prompting made simple).
- Quick wins: draft emails, summaries, meeting minutes, explanations, and comparisons in seconds.
- Converting rough notes ? clear communication.

- Quick checks: policy clarifications, error spotting, number verification.
- Simple finance examples: ratio explanation, cashflow description, quick scenario notes.

Section 2: Excel + AI – What Excel Cannot Do, AI Solves Instantly

(No machine learning terms, pure practical outputs)

- Turn messy text into clean tables using AI (better than any Excel formula).
- Get correct formulas instantly without trial-and-error.
- Explain any formula in plain English.
- Check where your Excel sheet is going wrong — AI finds the mistake.
- Generate pivot-style summaries without creating a pivot.
- Convert handwritten or screenshot data ? usable Excel data.
- Create conceptual tables: goal planning, category splits, MIS skeletons, cost headers, etc.

Section 3: AI for Data Analysis – From Raw Data to Insights in Minutes

(No Power BI needed — deeper analysis using AI)

- Upload raw data ? get structured reports instantly.
- Identify trends, variances, anomalies, and key call-outs with AI.
- Create dashboards (text + charts) without Power BI or Looker Studio.
- Drill-down explanations for management queries.
- Data sanity checks — identify gaps, mismatches, outliers.
- Convert data output ? board-ready commentary.

Section 4: AI for Research & Decision Support

(AI agents, competitor data, pattern insights, checks)

- Competitor benchmarking from public domain data (annual reports, websites, news).
- Extract useful insights from long PDFs in minutes.
- Forecasting based on historical patterns (no models required).
- Find errors, contradictions, and mismatches in uploaded documents.
- Use simple AI agents to automate repetitive research tasks.
- Best sources for finance research and how AI connects them.
- Hands-on activities + quiz: participants practice real-life finance scenarios.

AI in Finance Hands-On Workshop Agenda (1 Day)

10:00 - 10:30 | Welcome & Introduction

- Workshop overview and objectives
- Introduction to AI and its relevance to finance in industry.

10:30 - 11:30 | AI Fundamentals for Finance

- Core concepts of AI, machine learning, and generative AI.
- Key AI finance applications: forecasting, fraud detection, risk management

11:30 - 11:45 | Coffee Break & Networking

11:45 - 13:00 | Practical Session 1: AI Tools for Financial Data Analysis

- Hands-on with AI-powered tools for data cleaning, anomaly detection, and financial forecasting.
- Exercises using sample financial datasets.

13:00 - 14:00 | Lunch Break

14:30 - 16:00 | Practical Session 2: Generative AI in Finance

- Using generative AI for report summarization, automated investor communications, and scenario analysis.
- Live demo and participant practice with tools like ChatGPT and Excel GPT.

16:00 - 16:30 | Tea Break

16:30 - 17:30 | Case Study & Group Exercise

- Application of AI models for credit scoring or risk assessment
- Group work followed by discussion on interpretation and ethical considerations

17:30 - Onwards _ Open Networking

Wrap-up & Next Steps
Summary of learnings and best practices for AI adoption in finance workflows.

Q&A and resources for further learning

- **Who can Attend**

Ideal Participants:

- **Finance Managers, Analysts, Controllers, Dept Heads who want to leverage AI to improve financial processes & decision making.**
- **Business analysts & data analysts.**
- **Risk management & compliance officers.**
- **IT & digital transformation leaders.**

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Facilitator profile:

Kannan M. is an accomplished Consultant and Corporate Trainer specializing in **AI-driven productivity, data analysis, personal finance, and management skill development**. He holds a Bachelor's degree in Chemical Engineering from Coimbatore Institute of Technology (CIT, 1978–83) and a **Master's in Engineering Management from BITS Pilani**.

With a rich professional background spanning chemical process industries, international project assignments in Sri Lanka, Dubai, and the UAE, and two decades at Southern Petrochemicals Corporation (SPIC), he brings deep expertise in operations, plant management, control systems, HAZOP, power plant commissioning, and process optimization. His leadership experience includes managing large teams, driving ISO certifications, infrastructure upgrades, and business continuity initiatives.

Kannan is a visiting faculty member at the Institute of Chartered Accountants of India (ICAI), where he conducts programs on advanced Excel, databases, negotiation skills, interpersonal effectiveness, and software tools relevant to finance and analytics. He has also guided engineering projects and mentored AMIE aspirants—demonstrating broad multidisciplinary strength.

In recent years, Kannan has established himself as a sought-after trainer in **AI for Productivity and Data Analysis**, delivering highly rated workshops across academic institutions and corporations. Notable achievements include:

- **Annamalai University Alumni – AI Training (2025):** Received an exceptional **4.6/5** participant rating for a comprehensive two-part program on AI for research, writing, analytics, and automation.
- **Corporate AI Training:**
 - **Lechler India, Thane (Mumbai):** Delivered hands-on AI and Excel productivity programs for engineering and operations teams.
 - **Ultramarine & Pigments Ltd., Ranipet:** Conducted AI, data analysis, and advanced Excel workshops for managers and technical staff.

- **Canara Robeco mutual funds:** Facilitated AI-assisted process improvement in personal finance
- **Asset Management Companies (AMCs):** Engaged by multiple AMCs—including UTI, Quantum, and others—to train relationship managers, MFD networks, and AMC staff on AI for presentations, research, financial content creation, and investor communication.

Across these engagements, his sessions are widely recognized for clarity, practical relevance, strong demonstrations, and real-time case studies. His programs blend AI tools, prompt design for finance, data research workflows, and Excel-AI integration—making them immediately useful for corporate teams.

Kannan remains deeply connected with academia and industry bodies such as MMA, providing value-driven AI training for faculties, students, executives, and senior professionals. His consulting practice also extends to personal finance advisory, SIP planning, hybrid fund analysis, and portfolio education.

He continues to mentor and train with the same enthusiasm that marked his engineering career, now strengthened by modern AI expertise and a consistent record of high-impact delivery.

Fee Details:

- **Fee Details**
- Member amount : Rs 0.00- (Including 18%GST)
- Non Member amount : Rs 0.00- (Including 18%GST)
- Total Member count :