AFP FP&A SERIES

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A Complimentary Virtual Event for Finance Professionals

Designing Finance AI That Builds Acumen

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AFP FP&A Series

Building Financial Intelligence

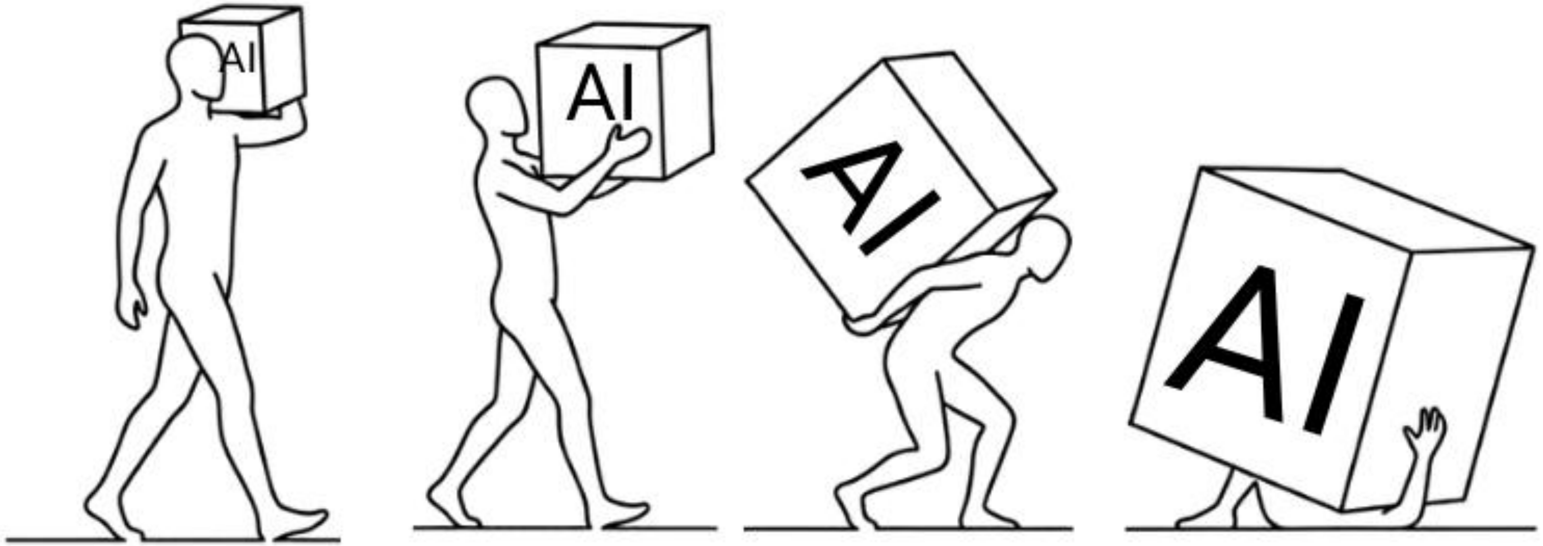
A little about me

- 25 years in corporate finance
- Three continents: Latin America, North America, Europe
- Now teaching finance teams to design AI workflows that hold up

https://linktr.ee/carolinalago_tactic

The Fear:

AI will quietly take over the work until there's less of *us* left.



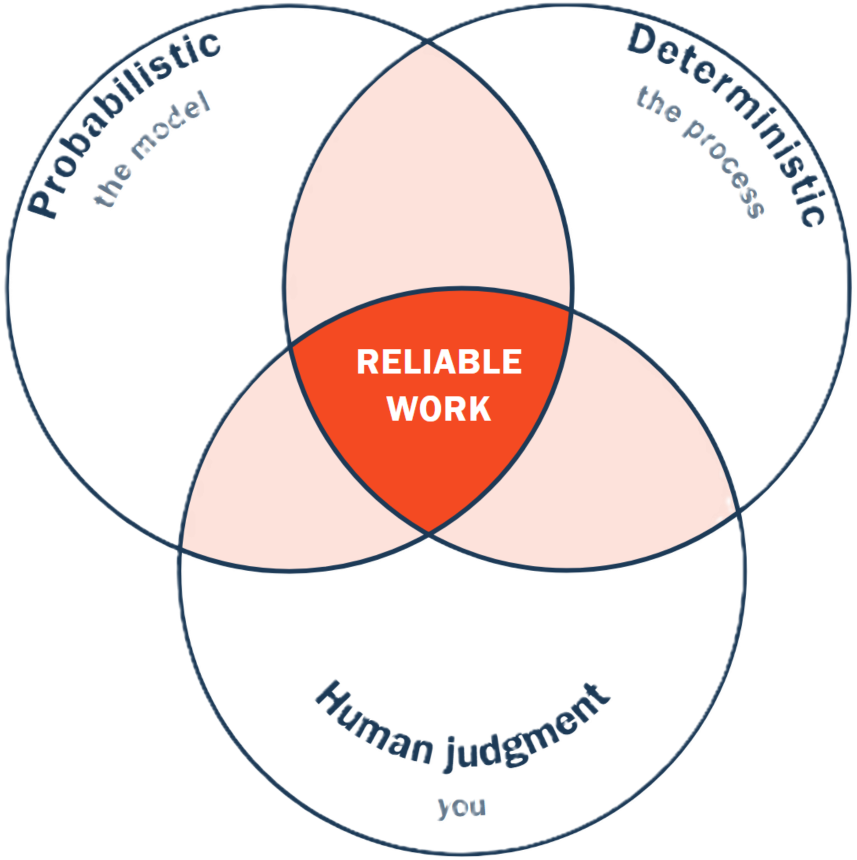
The Reality:

The professionals pulling ahead aren't using AI to go **faster**

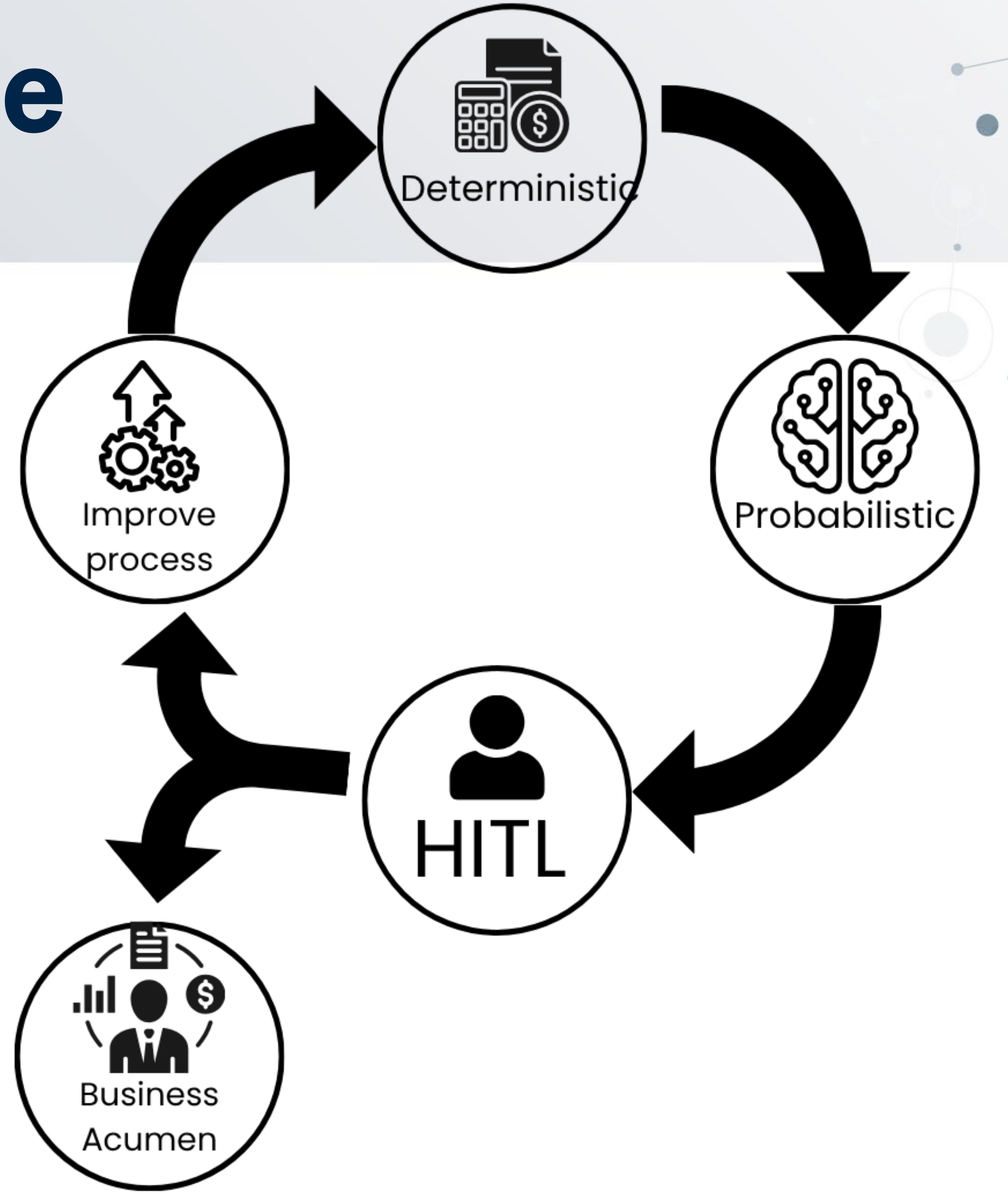
They design workflows that **extract their expertise** and the extraction makes them **more senior, faster.**

How do you design a workflow where you and the system get more senior together?

Three layers, not one tool



the Virtuous Cycle



Two words, before the demo

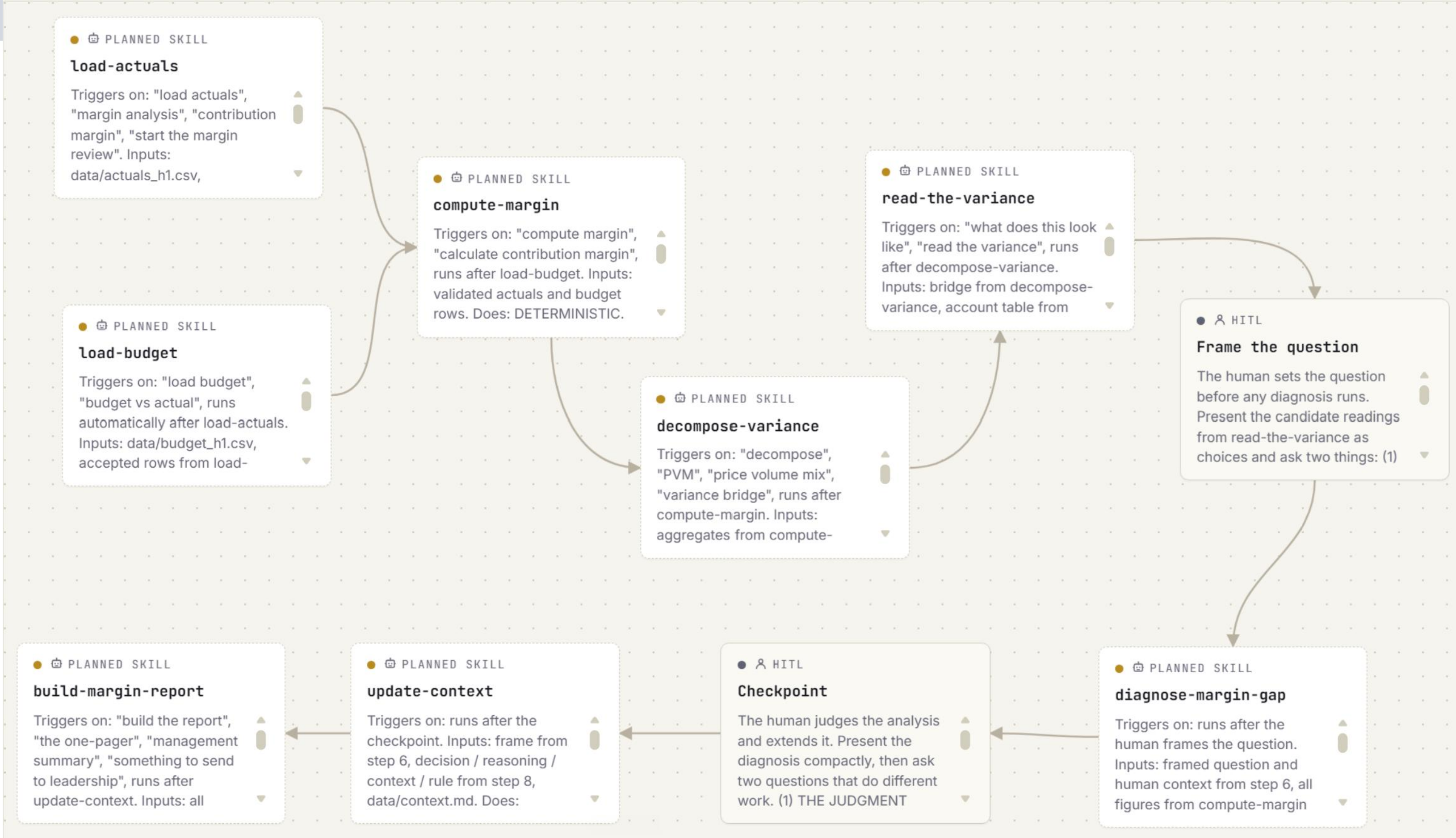
A skill

A folder with instructions for one specific task in the workflow. Plain English, no code — the handover note you'd write for whoever takes over your job.

A harness

The full environment around that workflow — the data it can reach, the tools it can use, the limits it works within, and where you step in.

The workflow



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Poll

When you picture AI in your finance team a year from now, what's your gut reaction?

1. It replaces a chunk of what I do
2. It speeds me up, nothing more
3. It makes me sharper at the judgment calls
4. Honestly, no idea yet

Poll

Which of these is part of contribution margin?

1. Sales commission paid per unit sold
2. The plant supervisor's salary
3. The annual software licence for the ERP
4. All three

Poll

Your margin percentage fell, but you didn't change a single price. What's the most likely explanation?

1. Mix: You sold more of the lower-margin products
2. Volume: You sold fewer units overall
3. Someone made an arithmetic error
4. Margin can't fall if prices didn't change

Most people think HITL means:

check the numbers → approve → sign off.

It should do **two** things:

Bring the context in

what you know about this business that isn't in any system. The workflow adapts; the skill learns this company.

Build your acumen

The step provokes your judgment, not just collects approval.

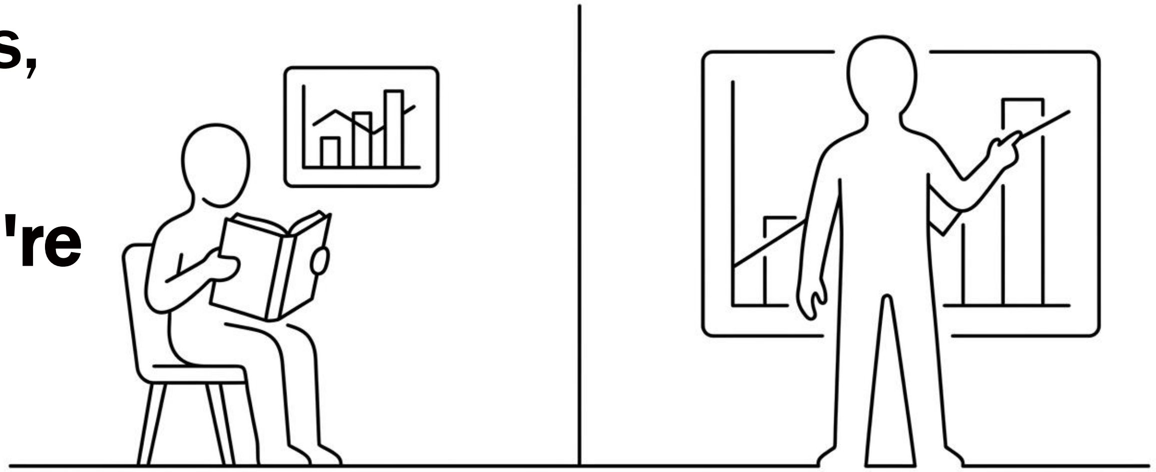
And this is how you get more senior faster

What a well-designed workflow puts in front of you

- **Where the problem actually sits** - not that you missed, but which part missed while the rest was fine
- **What's stuck versus what's lost** - two very different stories that look identical in a summary number
- **The assumption that hid it** - an average that was never wrong, and never useful
- **A second reading of the same data** - cut it another way and a different story appears
- **What it cannot tell you** - the honest blind spot. *This is the one that creates the checkpoint.*

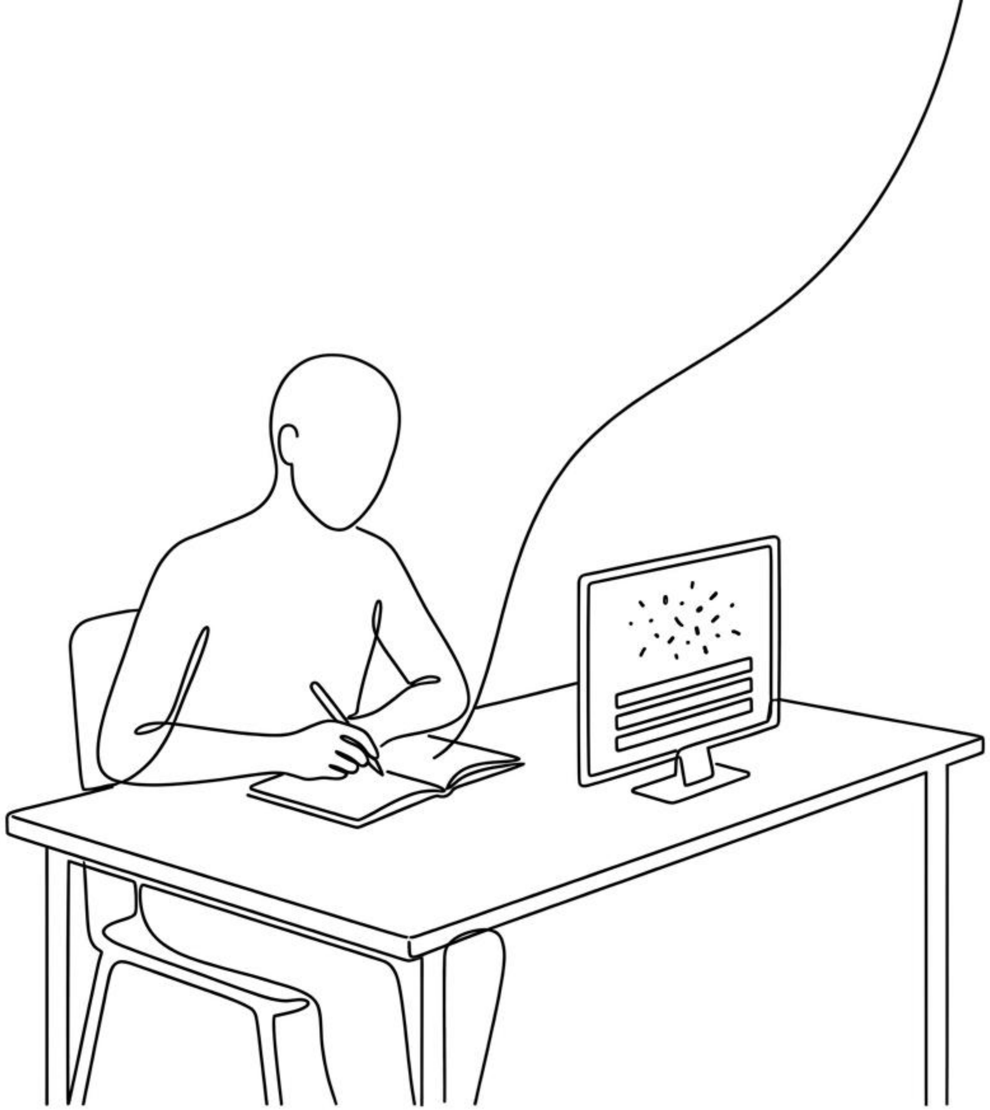
Why this isn't a textbook

- A textbook teaches the concept. **In the abstract. About someone else's company.**
- This puts it in front of you **in your own context** - your numbers, your business, this month.
- You're not studying the situation. **You're standing in it.**



Same design, every level

- **Junior analyst** - *why does this row look wrong to you?* → data judgment
- **Manager** - *which of these drivers would you defend to the CFO?* → prioritization
- **VP / CFO** - *here are two readings of this quarter - which strategy does each imply?* → thinking partner



The weekly habit

- Pick **one** recurring analysis.
- **Lock** what you can't afford to vary. **Loosen** the rest. **Design the checkpoint to ask you something** - not to collect a yes.
- One rule: *every decision gets a "why," and the why gets written down.*
- That notebook of *whys* is the next version of the workflow **and** the next version of you.

Try this week

- Take one analysis you wouldn't be embarrassed to have AI draft.
- Map its three forces · run one cycle · at the checkpoint, **write down three judgments and the reason for each.**
- *That's the loop, started.*

The promotion isn't earned by doing the work AI now does.

It's earned by being the only one in the room who can **teach the system and learn from it at the same time.**

Build the loop. You compound.