AETHEIS Technology Different

AI for Financial Planning and Analysis

Budgets, forecasts and scenarios

THE PROBLEM

FP&A teams spend more time collecting numbers than explaining them. Management wants scenarios and answers in hours, not a new spreadsheet in two weeks.

YOU LEAVE WITH

1. A driver-based forecast for one of your business lines.
2. Three scenarios with the assumptions behind each.
3. A management narrative drafted from the numbers.

LEARNING OUTCOMES

- Build a driver-based forecast with AI from their own data.
- Run scenarios and stress tests and document every assumption.
- Draft the management narrative and check it against the model.

DURATION
Full day, 09:00 to 17:00

HANDS-ON
5h30 practice, 1h00 theory (15%)

FORMATS
Public or in-house

GROUP SIZE
10 to 20 participants

LANGUAGE
English; French on request

TOOLS
Laptop; the AI assistant your organisation uses

ATTESTATION
Certificate of attendance

WHO SHOULD ATTEND

FP&A analysts, finance business partners and finance managers. Co-delivered by an Aetheis AI facilitator and a specialist from the field.

WHERE THIS SITS ON THE PORTOLAN ROUTE

Every AI course can feed a Portolan roadmap

1 · next	2	3	4	5	6
Session	Bearings	Route	First Crossing	Fleet	Harbour

PROGRAMME

Time	Block	Theory	Practice
09:00–10:45	**From data to drivers.** Finding the drivers in your history	15 min	90 min
11:00–12:30	**The forecast.** Building and checking a driver-based forecast	15 min	75 min
13:30–15:00	**Scenarios.** Three scenarios and a stress test	15 min	75 min
15:15–17:00	**The story for management.** Narrative, charts and the questions to expect	15 min	90 min
Total	Breaks and lunch not counted	**1h00**	**5h30**

LABS, ON YOUR OWN MATERIAL

Driver analysis
What really moves your numbers.

Forecast build
A forecast you can explain line by line.

Scenario set
Base, downside, upside, with assumptions.

Management pack
The narrative and the three charts that matter.

WHAT TO BRING

Anonymised actuals for one business line over 24 months and your current budget template.

AFTER THE COURSE

Atlas, the AI coach on Learn N' Succeed, follows up at day 3, 7 and 30. Your work and the prompt kit stay in your space and can feed a Portolan roadmap.

LEARNING PATH

BEFORE	THIS COURSE	AFTER
FIN1 AI for Financial Close	**FIN2 AI for Financial Planning and Analysis**	BLD1 AI Roadmap Design, finance edition

FORMATS AND PRICE

Rs 32,000 · €600 · USD 700

per participant

Full day, excluding VAT; lunch and materials included
Public sessions through the year
In-house on request, 10 to 20 participants

Not sure where to start?

Book the Portolan 20-minute call →
aetheis.com/portolan