

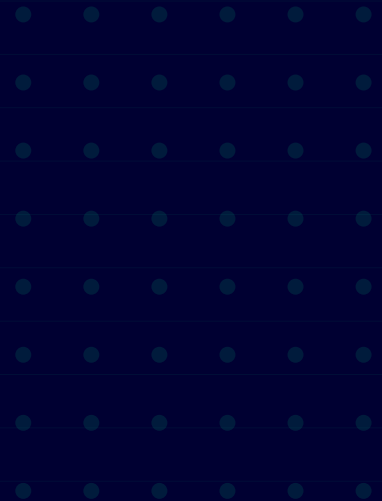
B2B & Enterprise Series

# Finance AI Readiness Checklist

33 questions every Finance Director  
should ask before deploying AI

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Use this checklist to assess your team's AI readiness  
across skills, tools, governance and training — and  
build a 90-day action plan to close the gaps.



# Why AI Readiness Matters for Finance Teams

Artificial intelligence is no longer a technology question — it's a finance leadership question. From AI-assisted month-end close to intelligent variance analysis, FP&A teams that adopt AI tools effectively are completing work in hours that used to take days. Those that don't risk being left behind on accuracy, speed, and strategic insight.

But readiness isn't just about having the right software. It's about whether your people understand how to use it, trust it, and govern it responsibly. A tool nobody understands is a risk, not an asset.

*"The finance teams getting the most from AI aren't the ones with the most advanced tools. They're the ones whose people actually know how to use them — safely, critically, and in the context of real finance workflows."*

## How to use this checklist

Work through each section with your team. For every statement, tick the box if your team can confidently say **yes**. At the end of each section, count your ticks and note your score.

Scores of 7–10: Strong foundation — focus on optimisation.

Scores of 4–6: Developing — prioritise structured training and governance.

Scores of 0–3: Early stage — this is where the biggest gains are available.

## 01 Skills Assessment

The foundation of AI readiness is human capability. Before deploying any tool, your team needs to understand what AI can and cannot do — and how to apply it safely in a finance context.

**■ Our team understands what large language models (LLMs) are and how they work**

Including their limitations — hallucinations, bias, and data cutoffs

**■ We can distinguish between AI tools suitable for finance and those that are not**

e.g. understanding when not to use a public LLM for sensitive financial data

**■ Team members can write effective prompts for finance-specific tasks**

Variance analysis, cash flow commentary, board report drafts

**■ We have staff who can critically evaluate AI-generated output for accuracy**

AI output must be reviewed — we have a process for this

**■ We understand how AI applies to our core workflows**

Month-end close, FP&A, management reporting, audit support, tax preparation

**■ Our team is aware of AI developments relevant to their role**

Copilot for Finance, Gemini, Claude, Perplexity and their use cases

**■ We have identified AI champions or early adopters in the finance team**

These people drive adoption and share learning internally

**■ New joiners receive AI literacy training as part of onboarding**

Not just IT tools training — finance-specific AI application

**Section 01**

**Score**

\_\_\_ / 8 (7–8: Strong | 4–6: Developing | 0–3: Early stage)

## 02 Tool Readiness

Having the right tools available is necessary — but not sufficient. This section checks whether your team actually knows how to use the AI-enabled tools already in your stack.

**■ We have Microsoft Copilot or similar AI tools deployed in our finance environment**

Excel, Teams, Outlook, or a third-party finance planning tool

**■ More than 50% of the finance team actively uses at least one AI-enabled tool**

Not just access — actual regular usage

**■ We use AI to accelerate Excel-based financial modelling or analysis**

Formula generation, scenario modelling, data cleaning

**■ AI tools are integrated into our ERP or financial planning system**

e.g. AI features in NetSuite, SAP, Oracle, Workday, Sage or Xero

**■ We have a clear policy on which AI tools are approved for use**

Including data handling requirements — what can and cannot go into a public AI tool

**■ We benchmark AI tool usage against industry peers or best practice**

We know how our adoption compares to similar teams

**■ We track time saved or productivity gains from AI tool adoption**

Even informally — ROI evidence for continued investment

**Section 02  
Score**

\_\_\_ / 7 (6–7: Strong | 3–5: Developing | 0–2: Early stage)

## 03 Governance & Compliance

Finance operates in a heavily regulated environment. AI introduces new risks around data privacy, audit trails, model bias, and accuracy. This section checks whether your governance framework has caught up with your tool adoption.

- We have a written AI usage policy for the finance team**  
Covering approved tools, prohibited data inputs, and review requirements
- Our AI outputs are reviewed by a qualified person before use in reports or decisions**  
AI does not produce final output without human sign-off
- We understand the GDPR and data residency implications of our AI tools**  
Including where data is processed and stored
- AI-assisted work is disclosed where required by auditors or regulators**  
We know when AI usage must be disclosed and have a process for this
- Our CPD compliance framework accounts for AI-related learning**  
ICAI, ACCA, CIMA, or CPA requirements for continuing professional development
- We have assessed AI risk as part of our wider risk management process**  
Technology, model, reputational, and compliance risks documented
- Senior leadership has approved our AI strategy and understands the risks**  
This isn't just an IT or ops decision — it has board/exec visibility
- We have a process for flagging and reviewing AI errors or unexpected outputs**  
When something goes wrong, we have a clear escalation path

### Section 03 Score

\_\_\_ / 8 (7–8: Strong | 4–6: Developing | 0–3: Early stage)

## 04 Training Programme Readiness

A one-off lunch-and-learn won't build lasting capability. This section checks whether your organisation has the infrastructure to deliver sustained AI learning at scale.

- We have a structured AI training programme for the finance team**  
Not just ad-hoc access to tools — a defined curriculum or learning path
- Training is role-specific, not generic**  
Finance Directors, Management Accountants, FP&A analysts, and tax teams have different needs
- We use CPD-accredited content where possible**  
Especially important for ICAI, ACCA, CIMA, and CPA members with annual CPD requirements
- Training is updated regularly as AI tools and best practices evolve**  
A course from 2023 is already largely outdated
- We track completion rates and learning outcomes**  
Not just attendance — measurable skill development
- Training covers real finance workflows, not generic AI concepts**  
Does the content use finance-specific examples: cashflow, variance analysis, tax returns?
- We offer a mix of self-paced and structured learning**  
To accommodate different schedules and learning styles
- We have budget allocated for ongoing AI learning and development**  
Training is treated as infrastructure, not a one-off cost
- We can demonstrate ROI from AI training to senior stakeholders**  
Time saved, error reduction, staff confidence scores
- New hires can access AI training from day one**  
Not just experienced staff — AI literacy is a baseline expectation for all new finance joiners

### Section 04 Score

\_\_\_ / 10 (8–10: Strong | 5–7: Developing | 0–4: Early stage)

## 05 Your 90-Day AI Readiness Action Plan

Based on your scores above, use this framework to prioritise where to focus first. The goal is not perfection — it's progress. Pick two or three actions from each phase that address your lowest-scoring sections.

### Days 1–30: Assess & Align

- Identify your AI champions — the 2–3 people in finance who are most curious about AI
- Audit which AI tools your team currently uses (officially and unofficially)
- Run a 30-minute team session to gauge current AI confidence and identify key concerns
- Draft a simple AI usage policy — even a one-pager is better than nothing
- Map your CPD obligations and identify where AI training counts toward annual requirements

### Days 31–60: Build Capability

- Launch a structured AI training programme covering your team's core workflows
- Run a prompt engineering workshop specific to finance tasks
- Create a shared library of approved AI prompts and use cases for your team
- Review your ERP/planning tool for AI features you're not yet using
- Set a simple target: every team member completes at least 3 hours of AI training

### Days 61–90: Embed & Measure

- Measure time saved on at least two key workflows (e.g. month-end commentary, variance analysis)
- Update your AI governance policy based on what you've learned
- Present a short ROI summary to your CFO or Finance Director
- Plan Q3–Q4 training — AI is evolving fast; schedule quarterly learning reviews
- Identify the next skill gap: what does your team need to learn next?

# Closing the Gap — How Learnsignal Can Help

If your scores reveal gaps in skills, training infrastructure, or governance, you're not alone. Most finance teams are navigating AI adoption without a clear roadmap — and without training that's actually built for accountants, tax professionals, and FP&A teams.

Learnsignal's Finance AI Training offering is designed specifically for this. We provide:

<b>213+ courses</b>	Covering AI for accounting, audit, tax, FP&A, compliance, and finance operations
<b>CPD accredited</b>	ICAI recognised, with ACCA and CIMA accreditation in progress
<b>Flexible delivery</b>	Self-paced library, live virtual bootcamps, or fully bespoke in-house programmes
<b>Role-specific</b>	Tailored paths for Finance Directors, Management Accountants, FP&A analysts, and more

## Ready to close your team's AI readiness gaps?

Book a 20-minute call with the Learnsignal team. We'll review your scores, recommend the right programme for your team, and show you how we've helped finance teams across Ireland and the UK get AI-ready fast.

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