

LEADING AI-DRIVEN FINANCE TRANSFORMATION

Strategy, Governance & Execution for
CFOs and Finance Leaders

21-22 September 2026

Dusit Thani Hotel, Dubai

9:00 am to 4:00 pm



Course Director

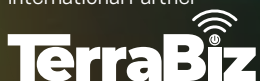
Daniel Clark

Chair, ICAEW Tech Faculty Board

Former Executive Director, Goldman Sachs

Founder & Director, Digital Skills for Professionals Ltd

International Partner



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COURSE OVERVIEW

AI is rapidly reshaping finance functions across industries, creating new opportunities, new risks, and new expectations for finance leaders. CFOs and finance leaders are increasingly expected to do more than understand it – they are being asked to evaluate it, govern it, and lead it. The question is no longer whether AI belongs in finance, but how to use it with rigour, accountability, and confidence.

This two-day programme is organised around three questions every finance leader should ask about any AI use case before committing to it: Is it reliable? Do we have the skills? Who is accountable if it goes wrong? Only one of these questions is about the technology – the others are about the organisation. We use them to find where AI adds real value across the finance function and to apply discipline to each use case.

Through hands-on labs, practical finance examples, peer discussion, and implementation planning exercises, participants will evaluate real use cases, explore the challenges of imperfect data and AI governance, and develop a practical roadmap for responsible AI adoption within the finance function.



LEARNING OUTCOMES

By the end of the programme, participants will be able to:

- Evaluate any AI use case in finance, ensuring appropriate judgement and accountability.
- Distinguish where AI reliably adds value from where it introduces risk, using evidence rather than vendor claims.
- Assess their organisation's data readiness and work realistically within imperfect-data environments.
- Evaluate finance processes for AI suitability and identify credible pilots.
- Judge the capability and AI literacy their team needs and how to build it.
- Develop a personal action plan for next steps.

WHO SHOULD ATTEND

- CFOs, Deputy CFOs & Finance Directors
- Heads of Finance & Financial Controllers
- FP&A, Treasury & Corporate Finance Leaders
- Finance Transformation & Shared Services Leaders
- Internal Audit, Risk & Governance Professionals
- Strategy, Digital & Business Transformation Leaders
- Future CFOs and high-potential finance executives

APPLIED LEARNING: WHAT TO EXPECT

- Test current AI tools on finance-relevant tasks and understand where outputs can and cannot be trusted.
- Work through AI-assisted reporting, variance analysis, and management commentary exercises.
- Assess data readiness and identify realistic opportunities in imperfect-data environments.
- Explore AI applications across FP&A, treasury, month-end close, and board reporting.
- Build and stress-test a governed AI pilot plan with peer feedback.
- Leave with practical next steps for responsible AI adoption within the finance function.

COURSE OUTLINE

Day One - Where does AI add value, and can we rely on it?

AI in an age of economic uncertainty

- The strategic case for AI in finance and what is actually holding adoption back
- Separating the evidence from the hype
- The three questions that frame the programme

AI landscape for CFOs

- What today's frontier models can and cannot reliably do
- Distinguishing embedded assistants, embedded agents and cross-platform agents
- Integration into ERP and EPM platforms
- What "agentic" really means for finance.

Hands-on lab: AI on real finance tasks

- Guided use of current tools on finance-relevant work
- Where the output is trustworthy, where it fails, and how you can tell the difference

AI-assisted financial reporting and management commentary

- Where AI helps with reporting and narrative, and where it introduces risk
- Retaining accountability for both the numbers and the story
- Hands-on variance-analysis and commentary exercise
- Group critique: comparing verification approaches

Transforming the finance function: worked examples

- A transformation map across FP&A, treasury, month-end close and board reporting
- What kind of AI fits, what it changes and what it does not
- Regional case study
- Exercise: identifying and evaluating credible use cases in participants' own functions.

Working with fragmented and imperfect data

- Why most AI value is unlocked or lost at the data layer
- Data readiness diagnostic
- Understanding data lineage well enough to challenge an output
- Matching the use case to the data you have
- Exercise: sorting your own use cases by how well each tolerates imperfect data and deciding where to start.

Day One close: peer discussion

- Sharing and challenging candidate use cases across the group

Day Two - Can we do it well, and who is accountable?

Recap and reframe

- From "where could AI help?" to "how do we do it safely and well?"
- Revisiting the three questions introduced on Day One

Governance, risk and compliance

- Categories of risk with AI tools
- The regulatory picture, including regional variations
- AI governance maturity self-assessment exercise.
- Workshop: applying the risk frame to a real candidate use case in groups

Leading the AI-enabled finance function

- Building capability and what AI literacy requires
- Upskilling teams and maintaining the talent pipeline
- Overcoming resistance in established organisations.
- Exercise: building a capability and literacy plan for your own team

From pilot to plan: implementation and value realisation

- Turning a candidate use case into a credible, governed pilot
- Defining success, controls and accountability up front
- Data and capability prerequisites
- Workshop: build and stress-test your pilot plan with peers

Action planning and wrap-up

- Personal commitments and next steps
- Peer collaboration opportunities
- Resources for continued learning.

PRE-COURSE PREPARATION

Participants are encouraged to:

- Identify 2–3 finance processes in their organisation that could benefit from automation or AI enhancement.
- Review the pre-reading materials on AI fundamentals.

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Daniel Clark is an educator and thought leader at the intersection of finance, technology, and professional development. He qualified with EY as a Chartered Accountant and subsequently worked in a range of finance and HR roles, including stint as an Executive Director at Goldman Sachs. He then moved into corporate education and training and now has nearly two decades of experience in this field, including managing technology courses and other senior roles at BPP. In 2023 he set up his own company, Digital Skills for Professionals Ltd, which specialises in training to help accountants and related professionals navigate digital transformation. He is Chair of the ICAEW Tech Faculty Board, which advises the ICAEW on policy and member support relating to technology. He regularly contributes to industry discussions through podcasts, conferences and publications

He has delivered training on technology-related topics to many clients, at levels ranging from graduate recruits to C-suite, including:

Du Telecom, Juma Al Majid Group, MBRF UAE, Emerson FZE, ERTH Abu Dhabi, KPMG, American Express, Ford, UK National Health Service, R3 conference – trade association for UK restructuring and insolvency professionals, Finance directors of UK architects' firms, Collier Capital (largest secondary private equity firm in the UK)



WHAT FINANCE LEADERS SAID

"The session provided an in-depth perspective on AI and practical finance use cases that can improve efficiency while maintaining a strong focus on governance and compliance." – **CFO, ERTH Abu Dhabi**

"Daniel brought excellent clarity on how AI can be applied within the finance function. I left with greater confidence in developing an AI roadmap for our finance team."

– **Finance Director, Middle East & Africa, Emerson**

"A valuable combination of AI fundamentals and finance-specific applications. The programme was highly relevant, practical, and professionally delivered." – **Director Finance, Juma Al Majid Group**

"Daniel's ability to make complex concepts simple and relatable was truly impressive."

– **American Express**

"Insightful, practical, and full of fresh ideas. The session introduced relevant AI applications that finance leaders can begin exploring immediately." – **Finance Director, du**

REGISTRATION DETAILS

*Early Bird Special: **US \$1500 +VAT** Per Participant
(Register by Thu, July 30, 2026 – Save USD 700)

FEE STRUCTURE AFTER EARLY BIRD

Regular Fee
US\$ **2200** +VAT
Per Person

Group of 2-4
US\$ **1900** +VAT
Per Person

Table of 5
US\$ **1600** +VAT
Per Person

(*Early Bird and group discounts are mutually exclusive)

For registration(s), send us your
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Simfotix Cancellation Policy: for cancellations made in the 7 working days of the workshop, no refunds will be given.
Cancellations must be confirmed by email. Substitutions may be made at any time.

BRING DANIEL CLARK TO YOUR ORGANIZATION – SEPTEMBER 2026

Daniel Clark will be available for a limited number of corporate engagements during his September 2026 visit to the region. Organizations looking to accelerate their AI journey can explore customized in-house workshops tailored to their finance leadership teams, industry priorities, and transformation objectives. Sessions can be designed around practical use cases, governance frameworks, implementation planning, and capability building to support responsible AI adoption across the finance function.

EXECUTIVE ENGAGEMENT FORMATS

1-Day Intensive Workshop

A highly interactive programme for CFOs, Finance Directors, FP&A leaders, Controllers, and transformation teams, combining practical frameworks, hands-on AI exercises, and implementation planning to help finance leaders move from experimentation to execution.

90-Minute Board & Executive Briefing

A focused strategic session for Boards, CFOs, Audit Committees, and Executive Leadership Teams, providing insights into AI opportunities, governance considerations, risks, and the implications for the future finance function.