



COURSE OVERVIEW AI0150 **AI in Budgeting & Financial Reporting**

Course Title

AI in Budgeting & Financial Reporting

Course Date/Venue

December 14-18, 2025/TBA Meeting Room, The H Dubai Hotel, Sheikh Zayed Rd - Trade Centre, Dubai, UAE

Course Reference

AI0150

Course Duration/Credits

Five days/3.0 CEUs/30 PDHs

Course Description



This practical and highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using our state-of-the-art simulators.

This course is designed to provide participants with a detailed and up-to-date overview of AI in Budgeting & Financial Reporting. It covers the AI and its role in finance, AI trends in budgeting and reporting and data foundations for AI; the AI-driven decision-making, cloud and digital infrastructure in financial functions and AI-powered budgeting models; the machine learning techniques for budget forecasting, RPA in budget processes and dynamic budget simulations; the AI integration with financial planning software and modernizing financial reporting; the natural language processing (NLP) in reports and automated consolidation; and the AI in regulatory and compliance reporting, visualization and business intelligence and AI-driven financial forecasting.



During this interactive course, participants will learn the predictive and prescriptive analytics, cash flow forecasting with AI and anomaly detection and fraud prevention; the advanced AI planning workflows and AI strategy for finance functions; identifying the use cases and prioritization and building business cases for AI investment; redefining roles in AI-augmented finance teams, upskilling and reskilling strategies, human-AI collaboration models and leadership in AI adoption; the regulatory considerations and compliance, data protection and confidentiality; and the responsible AI usage policies and AI model transparency and fairness.



Course Objectives

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain an in-depth knowledge on AI in budgeting and financial reporting
- Discuss AI and its role in finance, AI trends in budgeting and reporting and data foundations for AI
- Carryout AI-driven decision-making, cloud and digital infrastructure in financial functions and AI-powered budgeting models
- Employ machine learning techniques for budget forecasting, RPA in budget processes and dynamic budget simulations
- Implement AI integration with financial planning software by linking AI with ERP and CPM tools, APIs, connectors, and middleware, no-code and low-code AI solutions and cloud deployment considerations
- Modernize financial reporting and apply natural language processing (NLP) in reports and automated consolidation
- Apply AI in regulatory and compliance reporting, visualization and business intelligence and AI-driven financial forecasting
- Carryout predictive and prescriptive analytics, cash flow forecasting with AI and anomaly detection and fraud prevention
- Implement advanced AI planning workflows and AI strategy for finance functions as well as identify use cases and prioritization and build business cases for AI investment
- Redefine roles in AI-augmented finance teams and apply upskilling and reskilling strategies, human-AI collaboration models and leadership in AI adoption
- Discuss regulatory considerations and compliance, data protection and confidentiality, responsible AI usage policies and AI model transparency and fairness

Exclusive Smart Training Kit - H-STK®



*Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The **H-STK®** consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.*

Who Should Attend

This course provides an overview of all significant aspects and considerations of AI in budgeting and financial reporting for financial managers, accountants and controllers, budget analysts and planning officers, finance directors, business analysts and data analysts in finance, internal auditors and those who are involved in finance, accounting, planning, and decision-making where AI can enhance efficiency and accuracy.

Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours

Haward's certificates are accredited by the following international accreditation organizations:

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Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



Mr. Douglas Robinson, MBA, BSc (Honors), Dip, is currently the **President** of **DSR Consulting** and the **Professor** of **Business Studies Unit (BSU)** at **Durban Institute of Technology (DIT)**, where he is lecturing at **MBA level** in **Project Management Plan**, **Project Management Professional**, **Project Managers Negotiation Skills**, **Projects System in HSE Management**, **Project Management Essentials**, **AI in Finance**, **AI in Budgeting**, **Dynamic Budget Simulations**, **Visualization & Business Intelligence**, **Anomaly Detection & Fraud Prevention**, **Data Security**, **AI Technologies in Financial Reporting**, **Sensitivity Analysis with AI**, **AI in Regulatory & Compliance Reporting**, **AI in Risk Prediction & Mitigation**, **Financial Management**, **Financial Accounting & Reporting**, **Analysis of Financial Statement**, **Finance Policies & Accounting Procedures**, **Applied Corporate Finance**, **Accounts Receivable: Planning, Organising & Achieving Best Practices**, **Accounts Payable from Accounting to Management**, **Financial & Credit Risk Management**, **Technical Project Management**, **Project Management**, **Project Integration Management**, **Project Work Monitoring & Control**, **Project Time Management**, **Project Quality Management**, **Project Cost Management**, **Project Risk Management**, **Risk Identification Tools & Techniques**, **Project Life Cycle**, **Budgeting & Cost Control**, **Problem Solving & Decision Making**, **ISO 9001 Lead Auditor**, **Entrepreneurship** and **International Business**.

Mr. Robinson has over **30 years** of international experience in **Contract Management**, **Quality Management**, **ISO Standards**, **Contracts Management**, **Contract Administration** Certification, **Contract Administration & Cost Control**, **Vendor Management Contract**, **Oil and Gas Contract Management**, **Effective Contract Risk Management**, **Essential Management of Suppliers & Contractors**, **Logistics & Supply Chain Management**, **Advanced Procurement Management**, **Inventory Control**, **Coding & Cataloging**, **Purchasing & Expediting**, **Outsourcing Strategies**, **Supply Chain Management for Risk and Competitive Advantage**, **Project Management**, **Business Systems**, **Operations Management** and **Business Re-Organization**. Further, he is a **Registered Assessor** of **Quality Management**, **Logistics**, **Supply Chain Management**, **Procurement Strategies**, **Purchasing** and **Outsourcing**.

As a leader in the **Quality**, **Procurement** and **Logistics** fields, Mr. Robinson facilitated in-house skills development programmes in a lot of companies worldwide and has **extensive consulting experience** in both the public and private sectors. His experience includes implementing SAP system in **Procurement**, **financial**, **sales**, **distribution**, **materials management** and **costing**.

During his long career life, Mr. Robinson worked for many **International companies** such as **Tiger Brands**, **Nestle's**, **Mondi Manufacturing**, **Mondi Forests**, **Masonite Africa Ltd.**, **Frame** etc. He worked as **General Manager**, **Quality Manager**, **Procurement Manager**, **Financial Manager**, **Contracts Manager**, **Logistics Manager**, **Logistics Superintendent**, **Project Manager**, **Purchasing Supervisor**, **SAP Facilitator**, etc.

Due to his thorough and long experience and knowledge, Mr. Robinson is **recognized internationally** as an **Expert** in **Logistics & Supply Chain Management**, **Procurement**, **Purchasing**, **Outsourcing**, **Strategic planning**, **business wellness analysis**, **Contract management**, **Project Management**, **feasibility studies**, **financial analysis**, **cash-flow forecasting**, **Capital investment analysis**, **risk analysis**, **Business process analysis**, and **Quality Management Systems**.

Mr. Robinson has a **Master's degree** in **Business Administration (MBA)** from the **University of Durban-Westville**, a **Bachelor's degree** with **Honors** in **Business Management** and **Administration** and **Diplomas** in **Medical Technology**, **Marketing Management**, **Business Management** and **Project Management** from the **University of Rhodesia** and from the **Damelin Management School** respectively. Further, he is a **Certified Instructor/Trainer**, a **Certified Trainer/Assessor** by the **Institute of Leadership & Management (ILM)**, an active member of international professional affiliations and delivered innumerable trainings, courses, workshops and seminars globally.



Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

- 30% Lectures
- 20% Practical Workshops & Work Presentations
- 30% Hands-on Practical Exercises & Case Studies
- 20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

Course Fee

US\$ 5,500 per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the workshop for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

Day 1: Sunday, 14th of December 2025

0730 – 0800	Registration & Coffee
0800 – 0815	Welcome & Introduction
0815 – 0830	PRE-TEST
0830 – 0930	Introduction to AI & its Role in Finance Definition and Evolution of AI in Corporate Finance • Differences Between Automation and AI • Key AI Technologies in Financial Reporting • Strategic Advantages of AI Adoption
0930 – 0945	Break
0945 – 1030	AI Trends in Budgeting & Reporting Predictive Analytics and Machine Learning • Natural Language Processing for Financial Narratives • Robotic Process Automation (RPA) in Finance • Benchmarking Global Best Practices
1030 – 1130	Data Foundations for AI Data Sources and Quality Requirements • Data Governance and Integrity in Finance • Data Structuring for Machine Learning Models • Cleaning and Pre-Processing Financial Data
1130 – 1215	AI-Driven Decision-Making Transforming Traditional Budgeting Processes • Augmented Decision Support Systems • AI versus Human Judgment in Finance • Ethical Considerations and Bias Management
1215 – 1230	Break
1230 – 1330	Cloud & Digital Infrastructure in Financial Functions Cloud Platforms for AI in Finance • Integration with ERP and BI Tools • Real-Time Data Streaming and Dashboards • Security, Compliance and Scalability



1330 – 1420	Case Studies: Global AI Finance Leaders AI Adoption in Fortune 500 Finance Departments • Success Stories and Measurable Outcomes • Lessons from Failures and Risks • Industry-Specific AI Applications
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day One

Day 2: Monday, 15th of December 2025

0730 – 0830	AI-Powered Budgeting Models From Static Budgets to Adaptive Forecasting • Scenario Planning with AI Models • Zero-Based Budgeting Using AI Insights • Predictive versus Prescriptive Budgeting
0830 – 0930	Machine Learning Techniques for Budget Forecasting Regression and Time Series Models • Forecast Error Reduction Strategies • Model Training and Validation • Using Real Data Sets for Forecasts
0930 – 0945	Break
0945 – 1100	RPA in Budget Processes Automating Manual Budget Workflows • RPA Bots for Data Entry and Reconciliation • Integration with Excel and ERP Systems • Error Detection and Escalation Protocols
1100 – 1215	Dynamic Budget Simulations Scenario Modeling and What-If Analysis • Sensitivity Analysis with AI • Budget Revision Triggers and Alerts • Real-Time Adjustment and Approvals
1215 – 1230	Break
1230 – 1330	AI Integration with Financial Planning Software Linking AI with ERP and CPM Tools • APIs, Connectors and Middleware • No-Code and Low-Code AI Solutions • Cloud Deployment Considerations
1330 – 1420	Hands-On Workshop: AI Budgeting in Practice Demonstration of AI Budgeting Platforms • Creating a Predictive Budget Model • Forecast Variance Simulation • Report Generation and Visualization
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Two

Day 3: Tuesday, 16th of December 2025

0730 – 0830	Modernizing Financial Reporting Traditional versus AI-Powered Reporting • Real-Time versus Periodic Reporting • Standardization and Automation • Visualization Dashboards
0830 – 0930	Natural Language Processing (NLP) in Reports Generating Narrative Reports Using AI • Automating Commentary and Insights • Language Models for Financial Data Interpretation • Regulatory and Disclosure Compliance
0930 – 0945	Break
0945 – 1100	Automated Consolidation & Close AI-Assisted Financial Consolidation • Eliminating Intercompany Mismatches • Faster Month-End and Year-End Closing • Continuous Accounting Principles



1100 – 1215	AI in Regulatory & Compliance Reporting AI for IFRS/GAAP Compliance Checks • Detecting Anomalies and Fraud Patterns • AI Audit Trail and Explainability • Regulatory Submission Automation
1215 – 1230	Break
1230 – 1330	Visualization & Business Intelligence AI-Driven Dashboards for Reporting • KPI Monitoring and Alerts • Drill-Down Analytics for Stakeholders • Linking BI Tools with AI Models
1330 – 1420	Case Simulation: AI-Driven Monthly Close Building Automated Close Workflows • Applying AI to Detect Variances • Automated Report Generation • Governance and Approval Cycles
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Three

Day 4: Wednesday, 17th of December 2025

0730 – 0830	AI-Driven Financial Forecasting Real-Time Forecast Updates • AI-Powered Scenario Modeling • Rolling Forecasts versus Annual Forecasts • Reducing Forecast Bias
0830 – 0930	Predictive & Prescriptive Analytics Identifying Key Drivers of Financial Performance • AI in Risk Prediction and Mitigation • Sensitivity and Uncertainty Modeling • Advanced Predictive Techniques
0930 – 0945	Break
0945 – 1100	Cash Flow Forecasting with AI Short-Term and Long-Term Cash Predictions • Linking Operational Data to Cash Forecasts • Early Warning Systems for Liquidity Risks • Integration with Treasury Systems
1100 – 1215	Anomaly Detection & Fraud Prevention AI-Based Internal Control Monitoring • Pattern Recognition in Transactions • Red-Flag Triggers and Escalation Workflows • Integration with Compliance Frameworks
1215 – 1230	Break
1230 – 1330	Advanced AI Planning Workflows Driver-Based Planning with AI • Scenario Optimization Models • Workforce and CAPEX Planning • Linking AI Forecasts with Strategy
1330 – 1420	Practical Lab: Building a Forecasting Model Uploading Historical Data Sets • Training ML Models for Forecast • Creating Dashboards with Insights • Generating AI Alerts and Actions
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Four



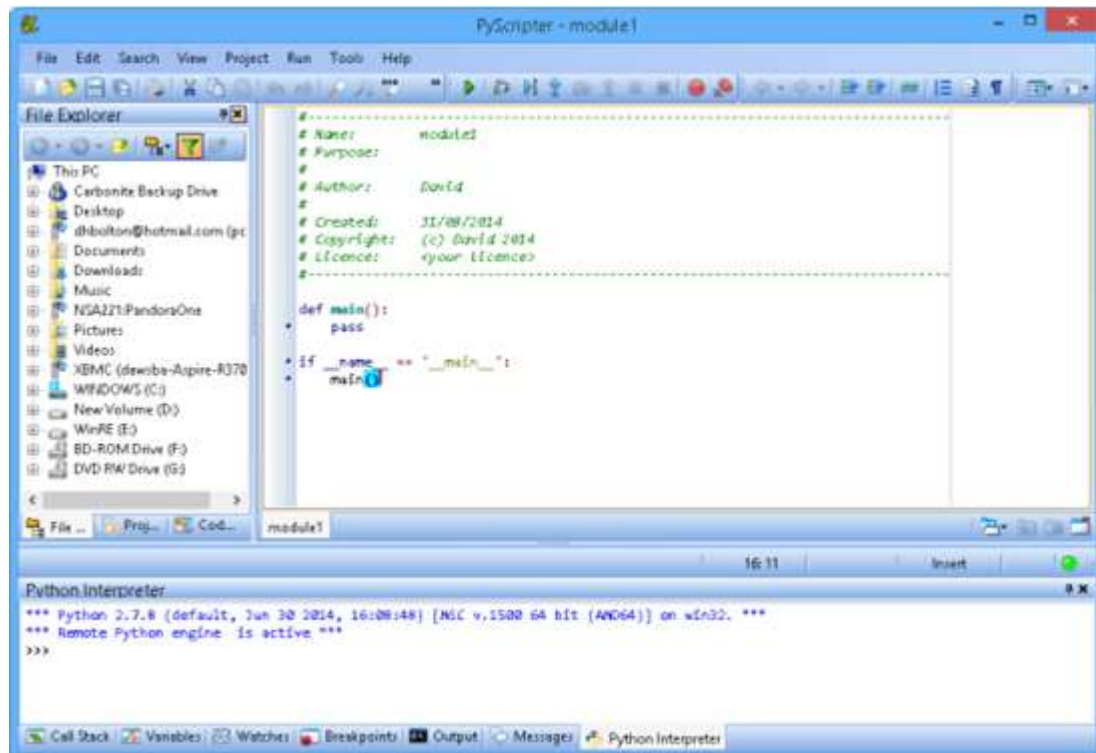
Day 5: Thursday, 18th of December 2025

0730 – 0830	AI Strategy for Finance Functions <i>Defining AI Objectives in Finance • Building Internal AI Capabilities • Aligning AI with Strategic Goals • Governance Structure and Ownership</i>
0830 – 0930	Implementation Roadmap <i>Identifying Use Cases and Prioritization • Building Business Cases for AI Investment • Change Management in Finance Teams • Defining Success Metrics and KPIs</i>
0930 – 0945	Break
0945 – 1100	AI & Human Capital <i>Redefining Roles in AI-Augmented Finance Teams • Upskilling and Reskilling Strategies • Human-AI Collaboration Models • Leadership in AI Adoption</i>
1100 – 1215	Data Security, Privacy & Ethics in AI Finance <i>Regulatory Considerations and Compliance • Data Protection and Confidentiality • Responsible AI Usage Policies • AI Model Transparency and Fairness</i>
1215 – 1230	Break
1230 – 1300	Future Trends & Emerging Technologies <i>Generative AI in Finance • Autonomous Finance Functions • Blockchain and AI Convergence • Adaptive Finance Ecosystems</i>
1300 – 1345	Capstone Exercise & Action Plan <i>Building an AI-Enabled Budgeting & Reporting Workflow • Presenting Strategy to Management • Risk and ROI Assessment • Roadmap for Scaling AI in Finance</i>
1345 – 1400	Course Conclusion <i>Using this Course Overview, the Instructor(s) will Brief Participants about Topics that were Covered During the Course</i>
1400 – 1415	POST-TEST
1415 – 1430	Presentation of Course Certificates
1430	Lunch & End of Course

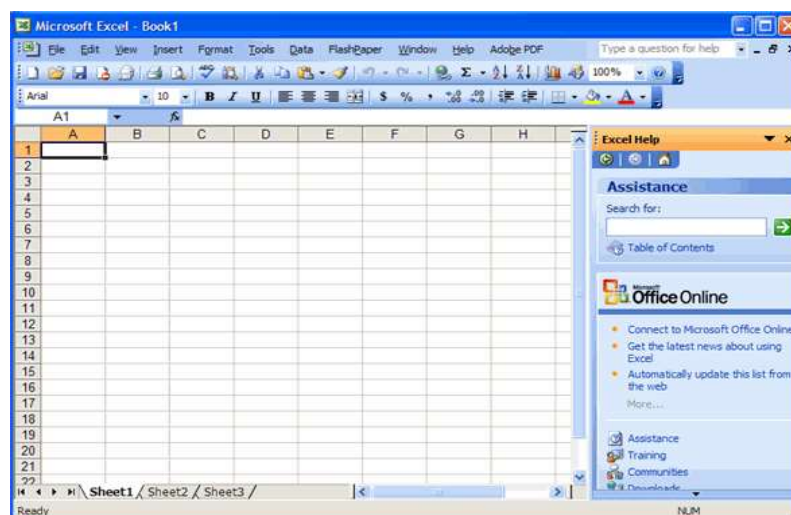


Simulator (Hands-on Practical Sessions)

Practical sessions will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using “PyScripter with Python” and “MS-Excel” application.



PyScripter with Python



MS-Excel

Course Coordinator

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