BPP
LYCEUM EDUCATION GROUP

AI for FP&A

Use AI to get from data to **a decision you can defend.**

Designed by finance experts. Delivered by AI experts.

Apply AI to the work you already know

- Live, instructor-led training
- Applied to real FP&A work
- Foundational and Practitioner levels
- From single tasks to a workflow
- Guided practice and expert review

Ask more of your performance data

Use AI to investigate drivers, explore scenarios and build financial narratives that support better-informed commercial decisions.

Why this matters now

When performance shifts, decision-makers need more than a description of what changed. They need to understand why, what could happen next and where their attention should go. These courses help you use AI to question data, test assumptions and develop clearer scenarios and recommendations. You'll apply the learning to familiar planning and analysis work, with commercial context guiding the conclusions you draw.

Course 1

Foundational

Use AI more effectively in individual tasks

Work you'll recognise: turning figures and department updates into a reporting draft; questioning the figures and assumptions in an AI-assisted forecast.

You'll leave able to

1. **Prepare the inputs and instructions for a useful AI draft in planning, analysis or reporting**
2. **Question an AI-supported financial draft against its figures, sources and assumptions**
3. **Refine the response and explain the finance decisions that stay yours**

Course 2

Practitioner

Use AI to connect multiple tasks into a workflow

Work you'll recognise: making AI commentary a repeatable part of monthly reporting; testing normal and exception cases.

You'll leave able to

1. **Pick a useful AI step in monthly reporting and map its inputs and human decisions**
2. **Build and test a guided prototype on approved sources, including errors and exceptions**
3. **Explain the permissions, review, escalation and evidence a workplace pilot would need**

At a glance

Learn

10 hours over two days
Live online and instructor-led

Apply

Within two weeks
In the workplace
One approved task based on real FP&A work
Instructor feedback

Review in group

1 hour group clinic
Live online and instructor-led
Shared peer learnings

Ongoing support

Templates, checklists and case examples available from day one, plus 90 days of support.

Ways to join

Courses run in cohorts of 15 learners.

Have enough people for a full cohort? Train your team together, on your own FP&A work and review standards. We can even explore tailoring.

Not quite enough people, or want to test it first? Talk to us about your team's needs.

£7,000
Full closed cohort

Cost is per course. Prices exclude VAT.

What you'll learn

Practical skills to bring AI into your role, whatever your starting point.

Course 1: Foundational

You'll learn to use AI on the task in front of you, and check the answer before you rely on it.

1. Gain confidence with AI in FP&A

Apply AI across budgeting, forecasting, variance analysis and board reporting, with prompts that work.

2. Use AI for everyday FP&A work

Use AI in Excel, planning platforms and BI tools, check market, cost and macro research, and write decision-ready narratives.

3. Use AI tools with FP&A data

Handle sensitive data responsibly, distinguish between descriptive and predictive analysis, and frame appropriate questions on performance and drivers.

4. Use AI responsibly in FP&A

Protect budgets, forecasts and plans, validate assumptions and sources, and challenge misleading AI-generated information.

Course 2: Practitioner

You'll learn to design, build and test AI-supported FP&A workflows, assistants and agents, with human approval before anything is released.

1. Design AI-enhanced FP&A workflows

Map budget-to-forecast workflows, separate automation from AI from judgement, and keep sign-off on assumptions, estimates and narratives.

2. Build and monitor FP&A AI workflows

Ground reusable prompts in approved planning data and KPI definitions, then test and measure ROI before and after go-live.

3. Deploy AI assistants and agents

Tell copilots from agents, deploy an assistant with clear sources and access controls, and streamline forecast refreshes with human review.

4. Run multi-agent systems

Judge when parallel scenario agents beat a single agent, preserve assumptions and versions, and keep faulty drivers out of board commentary.

Who it's for

Roles

Finance professionals working in planning, analysis or reporting, regardless of seniority or time in role.

Starting knowledge

Complete an AI skills diagnostic before the course begins to benchmark your current capability.

Foundational requires no previous AI experience. Practitioner is for people who already use and check AI on individual tasks.

Not sure which course?

Course 1: Foundational
"I want to use AI better on the task in front of me."

Course 2: Practitioner
"I already use AI confidently on tasks, and now want it to create AI-driven processes and workflows."

Choose by your AI experience, not your seniority.

Time and support

Learn live for 10 hours

Training, guided labs and feedback take place over two days. Materials available from day one; no advance study is required.

Apply one task

Within two weeks, try a suitable task using an approved tool and permitted information, or use a supplied case. Keep your reviewed work and a question for the instructor.

Return with your questions

Join a one-hour group clinic around day 30. Use the templates, checklists, worked cases and feedback for 90 days.

See your progress

Ongoing capability diagnostics show where your skills and confidence are growing, and where to explore and practise next.

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Not sure where AI fits in your work?

Here's what you could learn to do.

Foundational

Turn figures and department updates into a reporting draft

- Choose useful source material and structure the AI request
- Refine the response and judge the effort against your usual approach

Practitioner

Make AI commentary a repeatable part of monthly reporting

- Turn an individual AI task into reusable instructions
- Connect it to a reporting process
- Test normal and exception cases

Why learn this with BPP?

Lecture
See an example explained

Lab
Try it in practice

Review
Review your result with an expert

Our accelerated learning framework moves learners between focused instruction, hands-on application and structured reviews. Built on practice, feedback and repetition, it turns knowledge into reliable, in-role performance.

We train professionals at all of the Big Four, so you're learning with a provider the profession already trusts.

We train professionals in 81% of FTSE 100 companies.

Two thirds of accountants in England and Wales have studied with us at some point in their career.

Is AI adoption a whole workforce priority?

From everyday work to building AI tools and leading AI decisions, our training covers every level. Connect pathways across apprenticeships, degrees, certifications and short courses, so your people strategy keeps pace with your AI strategy.

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