

Masterclass Module and Agenda

Tuesday, 19 August 2026 · 388 George St, Sydney CBD · 9:00 AM – 4:30 PM · AUD \$750 pp

Module Guide — Section 1.0

5 Modules

	Module Title	Duration
MODULE 1	AI & Finance: Where Are We Really	45 mins
MODULE 2	AI Toolsets for Finance Teams	1 hr 15 mins
MODULE 3	Understanding the Real Cost of AI	1 hr
MODULE 4	Build Your First Finance Agent	1 hr 45 mins
MODULE 5	Taking AI Back to Your Organisation	1 hr

MODULE 1

45 mins AI & Finance: Where Are We Really?

A grounding session that helps finance leaders accurately assess the current state of AI adoption — without the hype or the fear.

What's Covered

- Current state of AI adoption across enterprise finance functions globally
- The four stages of AI maturity in finance — where does your team sit?
- Real examples: what early-mover finance teams have achieved
- Common failure modes and why most AI pilots stall
- The non-negotiables: data, governance, and sponsorship

What You Leave With

- Understand where AI adoption in finance genuinely stands — not vendor hype
- Identify your team's current maturity stage
- Know the three common reasons pilots stall — and how to avoid them

MODULE 2

1 hr 15 mins AI Toolsets for Finance Teams

A practical, unbiased walkthrough of the AI tool landscape as it relates to finance — with hands-on tool exploration.

What's Covered

- Overview of the AI tool landscape relevant to finance — without the vendor noise
- Category deep-dive: Large Language Models (what they actually do in finance)
- Category deep-dive: Automation & workflow platforms
- Category deep-dive: Agentic AI frameworks — what are agents and why do they matter?
- Category deep-dive: Embedded AI in ERP, FP&A, and reporting platforms
- Hands-on: live exploration of 4–5 tools — attendees evaluate for their own context
- Understanding enterprise AI pricing: per-seat, consumption, token-based, and platform models
- How to evaluate a tool for security, compliance, and procurement approval

What You Leave With

- Navigate the AI tool landscape without being led by vendor marketing

- Evaluate any AI tool against enterprise security and compliance requirements
- Understand pricing models before entering procurement conversations

MODULE 3

1 hr Understanding the Real Cost of AI

The subscription fee is the smallest part of the cost. This module equips finance leaders to build a complete and honest business case.

What's Covered

- The true cost of AI: beyond the subscription fee
- Compute costs, integration effort, training data, and change management overhead
- Build vs. buy vs. partner: a practical decision framework for finance leaders
- How to structure a business case for AI investment
- Calculating ROI using real benchmarks from finance functions
- Quick wins vs. strategic plays – how to sequence your AI investment

What You Leave With

- Build a complete AI cost model – not just the licence fee
- Apply the build vs. buy vs. partner framework to your own context
- Calculate ROI using real benchmarks from enterprise finance implementations

MODULE 4

1 hr 45 mins Build Your First Finance Agent

The signature session of the day. Every attendee builds a working AI agent. Four pre-configured agent templates are available – attendees select the one most relevant to their role.

Agent Templates – Choose Your Build

Four pre-configured agent templates are available. Attendees select the one most relevant to their role and follow the facilitated build:

Option A: Month-End Close Checker

An agent that monitors close status, flags exceptions, and drafts stakeholder updates.

Option B: FX Variance Narrator

An agent that reads FX movements and auto-generates variance commentary for management reporting.

Option C: Forecast Commentary Generator

An agent that takes forecast data and produces board-ready narrative summaries.

Option D: Invoice Approval Agent

An agent that reviews invoice data, applies approval rules, and escalates exceptions.

What You Leave With

- A working AI agent built by you, in the room
- Source code and configuration files to take back
- A deployment guide for your workplace environment
- A troubleshooting checklist

MODULE 5

1 hr Taking AI Back to Your Organisation

The bridge between the workshop and the real world. This module gives every attendee a clear framework to return, present, and execute.

What's Covered

- Governance and controls: what a responsible AI framework looks like for finance

- Getting internal approval: risk, legal, security, and procurement considerations
- Change management: bringing your finance team on the journey
- The 90-day AI roadmap framework: how to start, scale, and sustain
- Common pitfalls and how to avoid them
- Building internal AI capability vs. relying on external support

What You Leave With

- Leave with a 90-day AI roadmap framework ready to customise
- Know how to navigate internal approval – risk, legal, procurement
- Have a change management approach for your finance team

THE DAY

How the day runs

▶ MORNING · CONTEXT & SKILLS · 9:00 – 11:15	
9:00 – 9:20	Welcome, objectives and build outcome
9:20 – 9:50	Practical Gen AI use cases in finance
9:50 – 10:20	Safe use, data rules, review and governance
10:20 – 10:35	Break
10:35 – 11:15	Prompting techniques for finance teams

▶ BUILD LABS · HANDS-ON · 11:15 – 3:25	
11:15 – 12:15	Build Lab 1 – Create the first version of your finance assistant
12:15 – 1:00	Lunch
1:00 – 1:45	Build Lab 2 – Add finance knowledge, rules and output templates
1:45 – 2:30	Build Lab 3 – Test with sample finance scenarios
2:30 – 2:45	Break
2:45 – 3:25	Build Lab 4 – Improve quality, controls and review steps

▶ AFTERNOON · DEMOS & PLANNING · 3:25 – 4:30	
3:25 – 4:00	Team Demos
4:00 – 4:20	Use case prioritisation and pilot planning
4:20 – 4:30	Wrap-up and next steps

WHY OCTANE

Credentials that matter

IBM Gold Partner

Most Awarded IBM Partner – APAC

10+ Years Enterprise Finance & AI

IBM Planning Analytics Specialists

Agentic AI · S&OP · FP&A

TRUSTED BY

Macquarie · NewsCorp · Tyro · Western Power ·
GrainCorp · PepsiCo · Wisetech

WHO SHOULD ATTEND

Finance practitioners only

Finance Leadership

- CFOs & Finance Directors
- Financial Controllers

Planning & Performance

- FP&A Leads & Managers
- Finance Transformation Leads
- Group Reporting Leads
- Business Finance Partners

Systems, Risk & Controls

- Finance Systems Managers
- Treasury & Risk Managers
- Internal Audit Leads
- Finance Technology Champions

THE FACILITATOR

Practitioner, not theorist

Ali Afzal

Financial & Management Accountant · AI Practitioner

An accomplished financial and management accountant with 10 years of experience across broad industries. Significant knowledge in financial and management accounting combined with a history of successfully setting budgets, targets and KPIs, and leading projects from planning through execution in time-sensitive environments.

linkedin.com/in/ali-afzal-data/

REGISTER

Enroll now!

AUD \$750

per attendee · excl. GST

Every registration is manually reviewed. We'll confirm within 48 hours. Seats are limited.

octanesolutions.com.au/ai-for-finance-masterclass

Or call us: +61 2 9002 0455

About Octane Software Solutions

Octane Software Solutions is a global enterprise technology specialist and trusted IBM Gold Partner. Winner of the 2025 IBM Partner Plus Award (APAC) for AI and Top 3 finalist in the IBM TechXchange Awards 2025. Deep expertise in IBM Planning Analytics, automation and agentic AI – helping finance, IT and business leaders turn AI experimentation into operational outcomes.