

AI Adoption Tips

Process Automation and Transformation

24 September 2026

START WITH THE PAIN

*One
Team,
One
Workflow*

**Give It
an
Owner**



**LET CODE
DO THE
MATHS**

*Keep the
Policy
Short*

**SET THE
DECISION DATE**



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Umesh Sharma CFA, FCA, MSc Analytics

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Start With a Painful Process

Pick work people already complain about: rekeying data, chasing approvals, writing the same report each month. Value shows up fastest where the pain is obvious.

Pick Work You Can Check

Choose tasks with a right answer someone can verify, such as a summary against its source document. If nobody can judge the output, you cannot improve it.

Count the Volume First

A task done hundreds of times a month is worth automating; one done twice a year is not. Estimate volume and minutes per run before you build anything.

Don't Buy the Demo

Impressive demos rarely survive real data. Test any tool on your own messy files and awkward edge cases before you commit budget or announce a programme.

Write the Baseline Down

Record today's time, cost, error rate and rework before the first pilot. Without a baseline you will spend months arguing about whether anything actually improved.





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6–8 weeks

**One Team, One
Workflow**

Keep the first pilot narrow: one team, one workflow, a few weeks. Narrow pilots finish, and finishing is what tells you whether the idea deserves to scale.

Run It in Parallel

Keep the current process running alongside the new one. Comparing both on the same work is the cleanest evidence you will get, and it protects the day job.

**Keep a Human in
the Loop**

Let AI draft, extract and match while people approve. Review holds quality up during the pilot and shows precisely where the tool still gets things wrong.

Log Every Failure

Keep a simple log of wrong, incomplete or odd outputs. The pattern in that log tells you what to fix, and gives risk and compliance something concrete to review.

Decide on a Date

Agree upfront when you will decide to scale, fix or stop, and what evidence decides it. Pilots without an end date quietly become permanent and unowned.





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Fix the Inputs First

Disappointing results usually trace back to messy inputs: duplicate records, missing fields, scanned PDFs nobody can read. Clean those and quality jumps on its own.

Connect It to Real Systems

Value appears when AI can read and write where the work happens, in the finance system, CRM or document store. Copying and pasting is a demo, not a workflow.

Keep Calculations in Code

Let the model explain and draft, but compute the numbers in a spreadsheet, query or script. Figures then stay reproducible and a reviewer can rerun them.

One Tool, Rolled Out Well

Pick one platform, set up access properly and train people on it. Three half-used trials cost more and teach less than a single tool people genuinely adopt.

Plan for Model Changes

Models and features change often. Keep prompts, instructions and settings in one place so you can retest and update quickly when a version changes underneath you.





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Name an Owner

Every use case needs one person accountable for quality, adoption and the decision to continue. Programmes without an owner drift into pilots nobody uses.

Train on Real Tasks

Generic AI training fades within a week. Run sessions on the team's own work, with their documents and their questions, so people leave with something they use.

Make Champions Visible

Find the people already using AI well and give them time to help others. Peer examples move adoption further and faster than instructions from the top.

Answer the Job Question

People assume the worst unless you are explicit. Say plainly how roles change, what stays with people, and what the time saved is meant to be spent on.

Reward Sharing, Not Hoarding

Create one place where teams post prompts, templates and failures. Shared learning compounds, while private tricks stay stuck in one person's inbox.





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Keep the AI Policy Short

One page on approved tools, what data may be used, what must be checked and who to ask beats a forty-page policy that nobody in the business ever reads.

Keep Data in Approved Tools

Client, personal and unpublished financial data belongs only in tools the organisation has approved, with contractual protection, access controls and logging.

Check Before It Goes Out

Anything leaving the organisation needs a named human check. Verify figures, names and quotes against the source, because the tool cannot carry responsibility.

Keep an Audit Trail

Record which tool produced what, from which inputs, and who approved it. Clients and auditors increasingly ask, and reconstructing it afterwards is expensive.

Know What the Rules Require

Obligations differ by sector and country, and higher-risk uses carry extra duties on data, oversight and records. Check them before deployment, not after.





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