
The Governed Workflow

Not AI literacy and not a demo. A half day in which each person takes one recurring piece of their own work, a reconciliation, a lead sheet, a forecast tab, a report pack, a vendor tracker, and turns it into a process that runs the same way every time: input, transformation, output, human check. The method is taught once, together, on one finance example everyone can follow, so every screen is in the same state. Then each person applies the same six steps to the file they brought. By the end, the team has ranked its recurring processes by hours, frequency, and how rule-bound they are, and chosen the two to start with. Runs on whichever AI tool your organization allows, Claude, Copilot, ChatGPT, or another. The pattern is what you keep when the tools change.

This is instructor-led, hands-on training. Trainees have access to a qualified instructor for the full duration, in the room or live online, and for questions by email for thirty days after.

LEARNING OUTCOMES

- One of your own recurring processes run through the pattern on your own file, with the one-page card to run it again: input, what I do to it, output, who checks it, how often, how long.
- The trust model in plain terms: what these systems are and are not, why the ERP stays and the spreadsheet layer shrinks, and what never goes in.
- The shared example, an AP sub-ledger to GL reconciliation, done together step by step, with a planted wrong answer and the ten-second check that catches it, so everyone has seen the method work before applying it.
- A ranked list of the team's recurring processes, by hours, frequency, and how rule-bound they are, with the two to start with and an owner for each, in the hands of the manager who booked the course.

OUTLINE · 2.5 HOURS (150 MINUTES OF INSTRUCTION)

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| 1. 20 min | What this is, and what it is not <ul style="list-style-type: none">• What these systems do reliably and where they guess. The ERP stays; the spreadsheet layer shrinks.• The pattern: input, transformation, output, human check. Deterministic where it must be, AI where it helps.• The data question, answered from the guide we sent ahead. |
| 2. 30 min | The method, once, together <ul style="list-style-type: none">• The AP sub-ledger to GL reconciliation on a shared practice file, every screen in the same state: the tie stays in the query, AI drafts the timing-versus-error explanations and the |

approval email.

- Writing the process card that becomes the instruction.
- A planted wrong answer, and the ten-second check that catches it. Fix the card, not the prompt.

3. 50 min

Your process, on your file

- Each person fills in a card for the task they brought and runs it: lead sheet commentary, forecast tab, report pack, vendor expiry tracker, close checklist. Same six steps, whatever the file.
- Pairs swap: you run your neighbour's card on their file. If a second person can reproduce it, it is a process. If not, the card is missing a line.
- Six starter tasks on the shared data for anyone whose file does not fit.

4. 20 min

The control layer

- What never goes in, and how you tell.
- Who approves, where the log lives, and how you would defend the output to an auditor.
- The harvest: one that worked, one that half-worked, one that was the wrong job for AI.

5. 30 min

What to start with

- The team lists its recurring processes and ranks them by hours, frequency, and how rule-bound they are.
- Pick the two to start with and name who owns each. Start with the high-volume, rule-bound ones the auditor will not ask about.
- The manager who booked the course leaves with the list.

AUDIENCE AND PREREQUISITES

Finance and operations staff: accounting, FP&A, AP and AR, finance systems, and the ops, HR, and procurement teams around them.

- A laptop and a login for whichever AI tool your organization allows for work. Setup instructions come ahead of the course.
- One recurring task and one file it uses. A sanitized or practice version is fine.

DELIVERY, COST, AND PROVIDER DETAILS

DATES AND TIMES

One session of 2.5 hours. Start and end date and time are set with the employer at booking and shown on the quote.

NUMBER OF PARTICIPANTS

Minimum 10, maximum 20 per session.

TRAVEL

None.

INSTRUCTOR

Neil Perejma, Principal, EPM ONE Consulting Ltd.

- Principal, EPM ONE Consulting Ltd. (incorporated 2016)
- 20+ years delivering Oracle EPM Cloud and Hyperion finance systems, including hands-on training for every implementation
- Daily practitioner of Claude, Claude Cowork, and Claude Code for finance-systems automation since 2024

DELIVERY METHOD

In-class at the employer's premises in Calgary, or virtual (live, instructor-led) on Zoom or Microsoft Teams.

COST PER PARTICIPANT

\$450 CAD. Session total \$4,500 CAD for up to 20 participants (minimum 10 billed). GST extra.

TRAINING CATEGORY

Business Process and Operations Management (corporate finance and accounting); Digital and Technological (digital tools)

TRAINING PROVIDER

EPM ONE Consulting Ltd.

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Phone on request

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ON COMPLETION

Each trainee receives a certificate of completion by name. The employer receives a paid invoice showing cost and payment date, and a letter confirming trainees and completion by name, the business day after the session. Trainee personal information for the grant application is submitted by the employer to the Alberta portal directly; EPM ONE Consulting Ltd. does not collect it.