

AI Acceleration Program for Leaders in Financial Services

Genezit Solutions
by Balazs Koltai

International Programs



10577



Virtual



18 hours



EUR 1,050

Early Bird Fees

EUR 950



Registration Deadline

26-Oct-2026

Early Bird Registration

Deadline

1-Oct-2026

Course Description:

The program provides the participants with the skills required to rapidly leverage AI strategically and successfully in their organizations.

The program equips leaders with the knowledge necessary to launch AI development program(s) at a high professional standard to reach specific business goals.

Participants work through their own organizational context throughout the program. By doing this, they prepare AI transformation initiative(s) to support the following business objectives:

- Automation: efficiency improvement and resource optimization, aimed at enhancing existing processes
- Innovation: improving products and services to enhance both customer and employee experience
- Decision making: strategic modernization for more transparent, data-driven decision-making and faster information flow
- Finally, revenue growth / quality improvement / service upgrade / churn reduction / cost reduction – or any business objective that is linked to the desired initiative

Sessions are highly interactive, leveraging facilitated discussions, live polling, pair-shares, breakout sessions, and plenary harvests. The in-class work and the assignments focus on participant-led use cases to maximize relevance and to deliver practical outputs.

The program provides participants with the necessary knowledge and skills to further use this methodology when working with their leadership teams.

The program is implemented using a tool- and vendor-independent approach, enabling unbiased and objective support to the participants. This independence ensures that the program focuses on the participants' business goals, risk considerations, and organizational context.

Target Audience:

Executives, senior leaders, heads of departments, innovation leaders, and mid-managers across business and support functions - professionals with decision-making authority, who wish to future-proof their domains and their organizations / teams with AI and digital transformation.

Course Objectives:

By the end of the training, participants will be able to:

- Recognize how AI is transforming the business environment, the financial sector, and the labor market
- Understand the limitations and opportunities machine learning (ML) and generative AI (GenAI) present
- Apply a strategic framework to evaluate AI development opportunities and link them to business goals and pain points
- Ensure scalability of AI initiatives across the organization
- Support AI initiatives within the organization and develop their teams' AI capabilities

Course Outline:

Day 1: AI fundamentals for executives and financial services leaders

This module provides foundational knowledge and strategic insight into the business application of AI. Participants gain an understanding of the business value of technology, how AI addresses pain points and supports corporate strategy, and how to design an AI implementation roadmap.

The training establishes the foundation for applying AI to support efficiency and innovation at individual, team, process, and organizational levels.

Objectives:

- Establish a shared language and framework for evaluating and prioritizing AI development opportunities
- Prepare for launching AI and generative AI (GenAI) projects
- Equip leaders with the knowledge needed to confidently prioritize and guide AI initiatives
- Define concrete action steps for the next module

Topics not covered in the training:

- Technical or model-level AI skills
- Regulatory, cybersecurity, or data protection compliance topics

Following the training, participants will be prepared for the next steps in the program.



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Day 2: Identification, evaluation, and prioritization of development opportunities (use cases)

In this module, AI and digitalization development ideas are collected and categorized based on each participants' context – by aiming to the highest possible business value.

During individual and joint work, first development opportunities are collected and mapped against business goals. Then participants transform the knowledge gained in Day 1 into concrete AI development opportunity (use case) priorities with professional guidance.

Objectives:

- Explore how AI and digitalization/automation can contribute to revenue growth, cost reduction, efficiency improvement, and decision support
- Rank development opportunities based on business impact and feasibility using a transparent and objective evaluation framework
- Identify high-potential use case(s) that deliver quick wins and/or strategic value and will be further developed in Day 3
- Define concrete action steps for the next module

Key activities in this module:

- Collect and evaluate AI development ideas based on objective criteria tailored to participants' needs, such as expected business value, feasibility, data maturity and availability, and strategic alignment
- Use a prioritization matrix to determine the most important development(s), which will be further elaborated in Module 3

Participants receive the information necessary to objectively and confidently decide which AI development opportunities to shortlist and under what conditions. The outcome is a strategic priority of AI use cases that ensure focus on the highest business values.

Day 3: Priority AI use case(s) definition and preparation

The goal of Module 3 is to provide participants with deeper visibility regarding their prioritized use case(s). Top use case(s) are explored in depth, defining expected outcomes, benefits, process changes, required data, resource requirements, and associated risks. The focus is not on technical details but on creating a comprehensive picture for business decision-making.

Objectives:

- Each participant evaluates his/her priority use case(s)
- Participants learn the best practices to gain clarity about an AI development opportunity or a use case – including the AS IS, TO BE, the size of the development / change required on business side, readiness, etc.
- Participants gain the skillset to use this exercise as a blueprint, and can lead such efforts within their teams going forward

Key activities in this module:

- Gather and structure the relevant information related to implementing selected top use case(s) by mapping out the current and the desired solutions
- Define the baseline (AS-IS) where the development will start from
- Develop a detailed view of the desired state (TO-BE) and compare changes in business processes, stakeholders, decision points, volumes and KPIs, data requirements, etc.).

This ensures that participants clearly understand what will be required from the AI development project, how to prepare for it, and what factors influence project success. They will also be better equipped to start discussions with potential vendors and position their organizations for the cooperation.

Risk reduction and executive decision support:

One of the greatest values of this module is that participants gain a realistic understanding of what to expect from a selected AI development. This will help avoid:

- Poorly defined expectations
- Misunderstanding of required resources
- Focusing on use cases that will ultimately not deliver real business value

As a result, leaders can make prioritization decisions based on realistic, transparent, and comparable information regarding which use case delivers the highest business benefit.

Assessment Strategy:

- Participants will be evaluated based on the end-of-course online exam results and their course work outputs.
- Each participant must achieve 75% attendance of the total virtual session times.
- Upon successful completion: participants will receive an EBI Certificate of Completion



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Course Language:

English (lecture, slides, worksheets)

Prerequisites:

- No technical background required
- Intermediate proficiency in English language

Trainer Bio:

Balazs Koltai

AI Advocate & Educator, Lecturer, Digital Transformation Leader

Balazs brings over 25 years of leadership experience in enterprise transformation and digital / AI strategy across global markets. As a seasoned educator, advisor, and keynote speaker, he specializes in equipping senior leaders to drive real-world AI adoption with confidence and clarity.

Highlights of his experience include:

25+ years of leadership in enterprise transformation across Europe, the US, and China

Recognized expert in AI strategy, digital transformation, and change leadership

Creator of the top-rated Business AI for Leaders course (NPS: 9.6 | CSAT: 100%)

Lecturer at multiple universities, keynote speaker at industry conferences on AI adoption and transformation

Founder of AI Acceleration Program: guiding leaders from vision to strategy to action

Led large-scale transformations across banking, finance, insurance, telecom, ICT, FMCG, healthcare, logistics, education, NGO; from multinationals to SMEs

Directed global training and communication programs reaching 25,000+ employees for enterprise platforms

Trusted by major institutions including National Bank of Egypt, KBC Bank, Hungarian

Development Bank, Aegon Global Technology, Konica Minolta, Deutsche Telekom IT Solutions,

Telenor, SPAR, American Express, Citibank, Provident Financial, Accenture, and more

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