Exercise 1A: AI Use Cases in Finance

MGMT 675: Generative AI for Finance

Pick a specific finance role (e.g., equity research analyst, credit underwriter, portfolio manager, compliance officer). Using Claude.ai, have a conversation in which you identify five concrete tasks that AI could automate or augment in that role.

For each task:

- Describe what the task involves today (without AI)
- Classify it as **"maker" work** (producing output: models, reports, presentations) or **"checker" work** (reviewing, validating, catching errors)
- Explain how AI would change the task

Then choose one of those tasks and apply the **OAVR framework** (Orient $\rightarrow$ Ask $\rightarrow$ Visualize $\rightarrow$ Recommend) to outline how you would approach it with AI. Describe: (a) what decision you're trying to make, (b) 3 specific questions that would change the decision, (c) what charts or tables you'd need, and (d) the format of your recommendation.

Write a brief argument for which of the five tasks would deliver the most value if automated first.

Deliverables.

- One-page summary with classifications and recommendation (`1A-Summary.pdf`)
- Screenshot of Claude conversation (`1A-Screenshot.png`)