

Orchestrating an FP&A Agent

Architecture, Prompts, and Packaging for Month-End Commentary

Hi, I'm Mike



- Corporate FP&A Leader
- Founder of F9 Finance
- Automated more than 100,000 hours out of finance processes

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Orchestration

An agent is just a structured workflow with AI in the middle



- Triggers – when it runs
- Data / Inputs – what it reads
- ***Decisions / Rules / Thinking – how it works***
- Outputs / Logging – what it produces
- Guardrails – what keeps it safe

What Is The B.O.T.S.A.F.E. Blueprint?

- B – Business Goal
- O – Owner & Users
- T – Triggers
- S – Steps
- A – Acceptance Criteria
- F – Failure & Fallback
- E – Evidence & Metrics

It is NOT a tech framework.

It's a design and governance framework for finance teams.

Building With AI

🌟 Welcome, Mike

Type / for skills

+

Sonnet 4.6

Write

Learn

Code

Life stuff

Claude's choice

You are an FP&A automation architect.

Convert this completed BOTSAFE Bot Design Canvas into an implementation-ready AI Agent Orchestration Flow.

Create a concise blueprint with these sections:

Agent Overview 2) Inputs 3) Triggers 4) Orchestration Flow 5) Prompting Strategy 6) Outputs 7) Controls 8) Logging 9) Metrics 10) Rollout Plan

Rules:

- Use only what's in the BOTSAFE canvas*
- Do not invent new requirements*
- Write in practical FP&A language*
- Produce a blueprint ready for a build team*

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Triggers

Triggers define **when and how** a bot runs.

- Time-based
- Event-based
- Manual

Triggers

Data

Thinking

Outputs

Guardrails

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Data / Inputs

Agents need boring, reliable data

Presented in a clean, repeatable format

Folder drop

Combine files

Table / String

Ready for Agent

Triggers

Data

Thinking

Outputs

Guardrails

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Decisions / Rules / Thinking

The master prompt is the rulebook for the agent

It translates policies and controls into the agent's "thinking"

Ensures outputs are consistent and repeatable

You are an FP&A automation expert. Using the orchestration flow and acceptance criteria, create a concise Master Prompt including: role and purpose, scope and constraints, calculation and validation rules, tone and narrative standards, required examples, stop conditions.

Rules: use only provided information, do not add new logic or data sources, write in practical FP&A language, focus on safety and consistency.

Triggers

Data

Thinking

Outputs

Guardrails

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Outputs / Logging

Outputs must fit real FP&A workflows

Format matters more than AI sophistication

Outputs create value. Logs create confidence

What To Capture

- Run date and time
- Data versions used
- Prompt version applied
- Validation results
- Approval status

Triggers

Data

Thinking

Outputs

Guardrails

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Guardrails

- Validation checks before drafting
- Reconciliation requirements
- Data and privacy restrictions
- Stop conditions for errors
- Clear escalation paths

Human-In-The-Loop

- Bot prepares
- Analyst reviews
- Manager approves
- Re-run and re-validate as needed



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The 30-Day Playbook

Week 1 – Design

- Fill out BOTSAFE canvas
- Align with stakeholders

Week 2 – Build

- Create prompts
- Configure data

Week 3 – Shadow Mode

- Run in parallel

Week 4 – Production

- Test and Adjust

Start small.

Prove it.

Then scale.