



AI AND AUTOMATION IN FINANCE & INSURANCE

DEVELOP. INNOVATE. FUTURE-PROOF.

Practical AI Strategies for Financial Professionals

Creating and using ChatGPT bot: step-by-step guide

Step 1

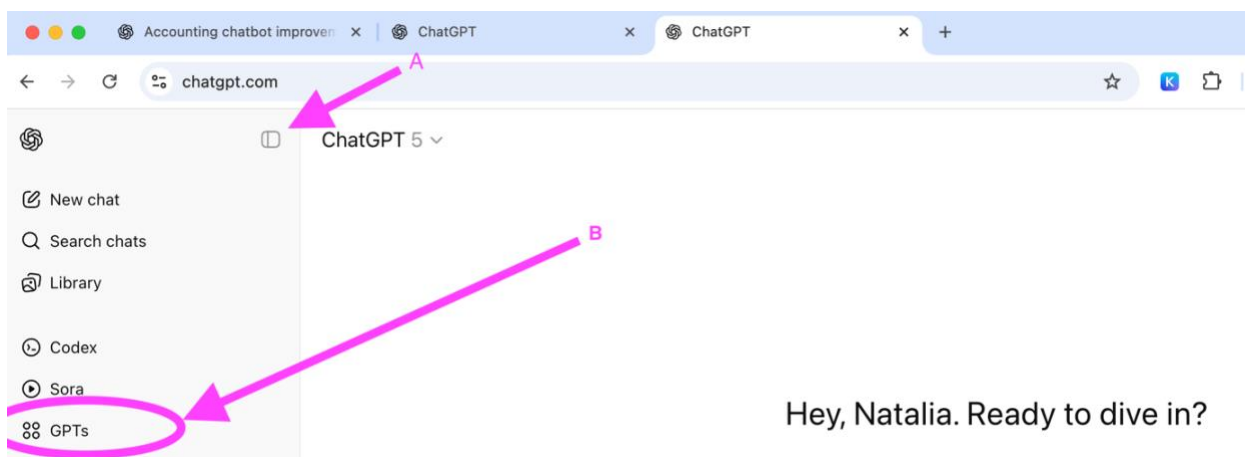
Open Chat GPT by following the link:

<https://chatgpt.com/>

If you do not have an account, make sure you create one before proceeding to Step 2.

Step 2

Unfold the left-hand side menu by clicking on the icon by the arrow A, and then click on the GPTs option pointed by the arrow B.

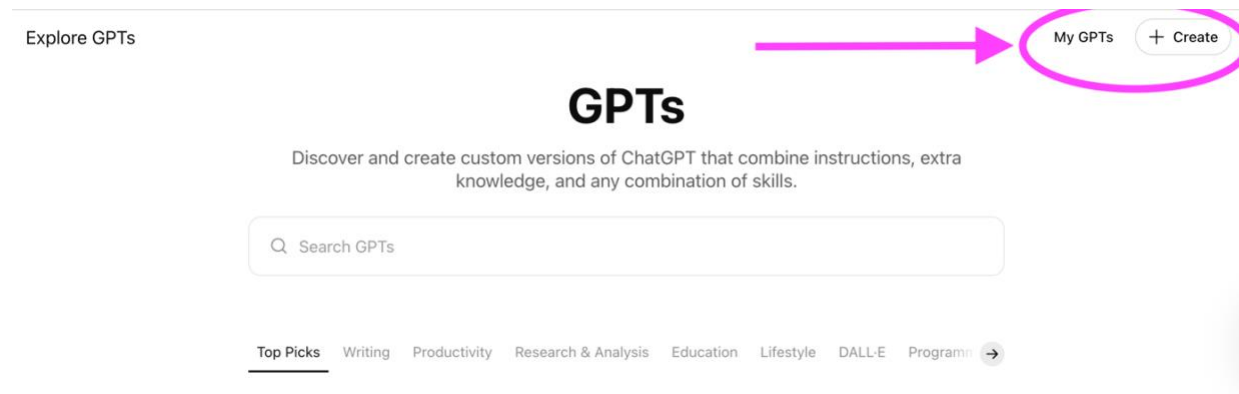


Step 3



TECH FEMME FUSION

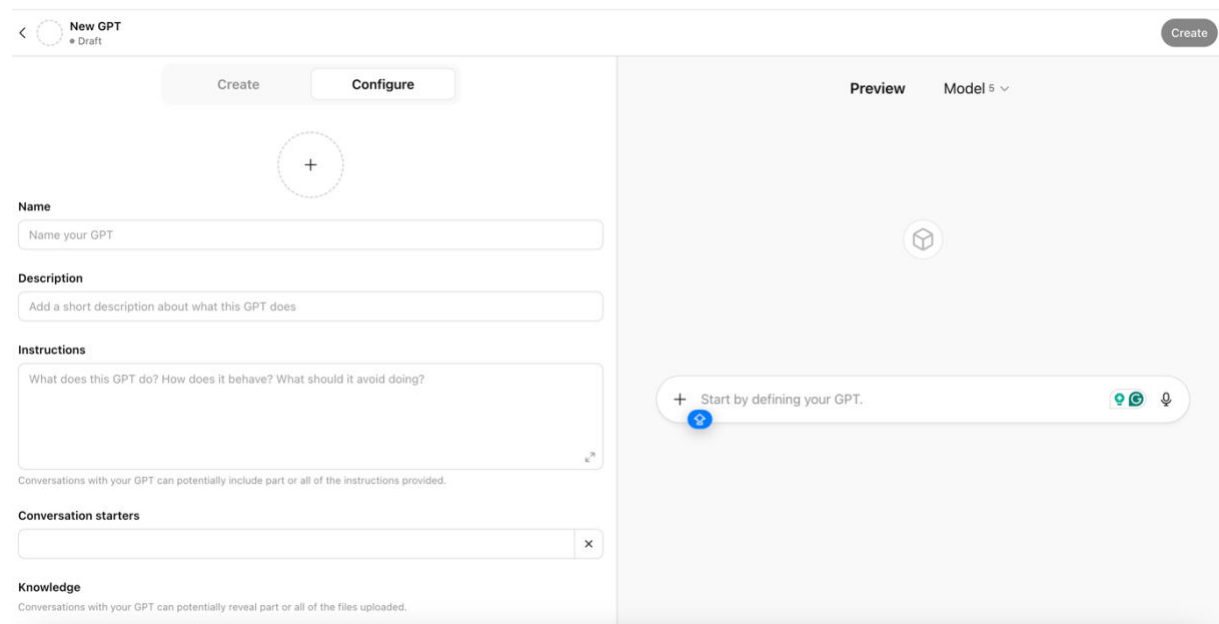
Select Create. This is to start creating your own chatbot or your own “GPT”



Step 4

The blank window will appear. First, fill out the “Name” field — you can choose any name. Next, provide a “Brief description” that captures the chatbot’s main role. The “Instructions” field can outline the chatbot’s functions, but in this exercise, we will skip it and go straight to the Knowledge section. Here, we will upload the existing company description and client files.

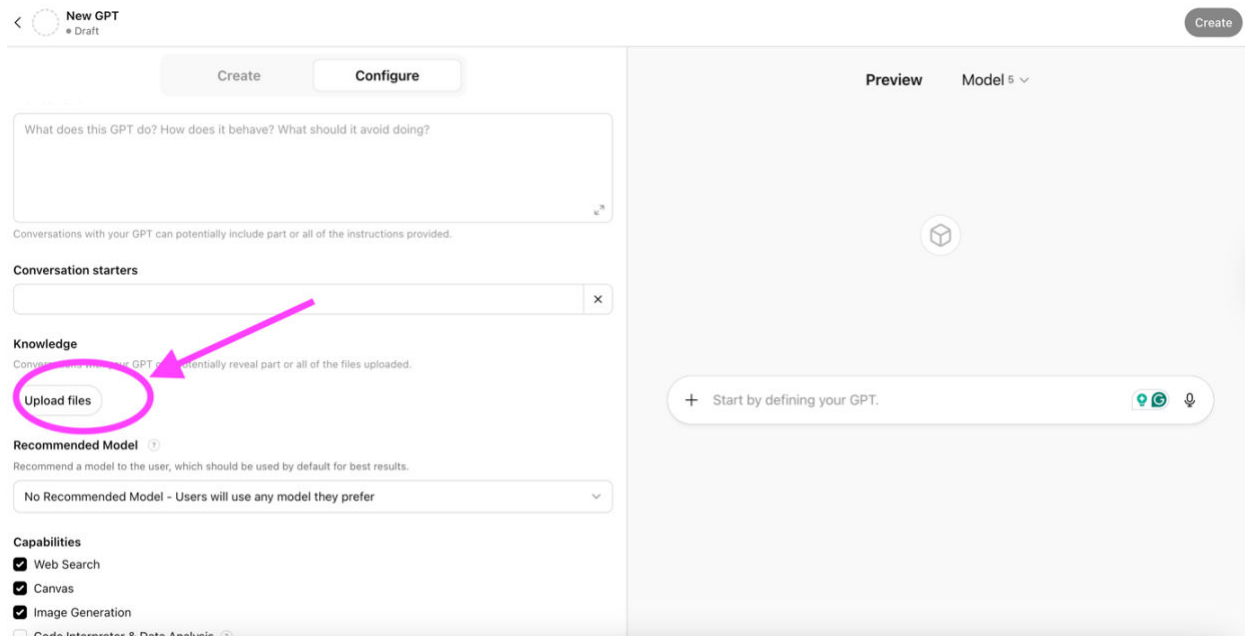
Uploading files serves the same purpose as writing detailed instructions, but it is easier to manage and keeps everything organised for this business case.



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Step 5

To upload files to the chatbot's knowledge base, scroll to the "Upload files" button in the Knowledge section, click it, and select the files from your computer — just as you would when attaching files to an email.



The screenshot shows the 'New GPT' configuration page. At the top, there's a 'Create' button and a 'Configure' button. Below these are several sections: 'Instructions' with a text area, 'Conversation starters' with a list, 'Knowledge' with an 'Upload files' button circled in pink and pointed to by a pink arrow, 'Recommended Model' with a dropdown menu, and 'Capabilities' with checkboxes for 'Web Search', 'Canvas', 'Image Generation', and 'Code Interpreter & Data Analysis'. On the right side, there's a 'Preview' section showing a chatbot interface with a 'Start by defining your GPT.' button.

Step 6

We have now filled out the Name of the chatbot (A) and the Brief description (B).

If you wish, you can add more information in the Instructions section (C). For example, you can tell the bot to use British English spelling when writing emails or to double-check with the user whether data privacy requirements have been met.

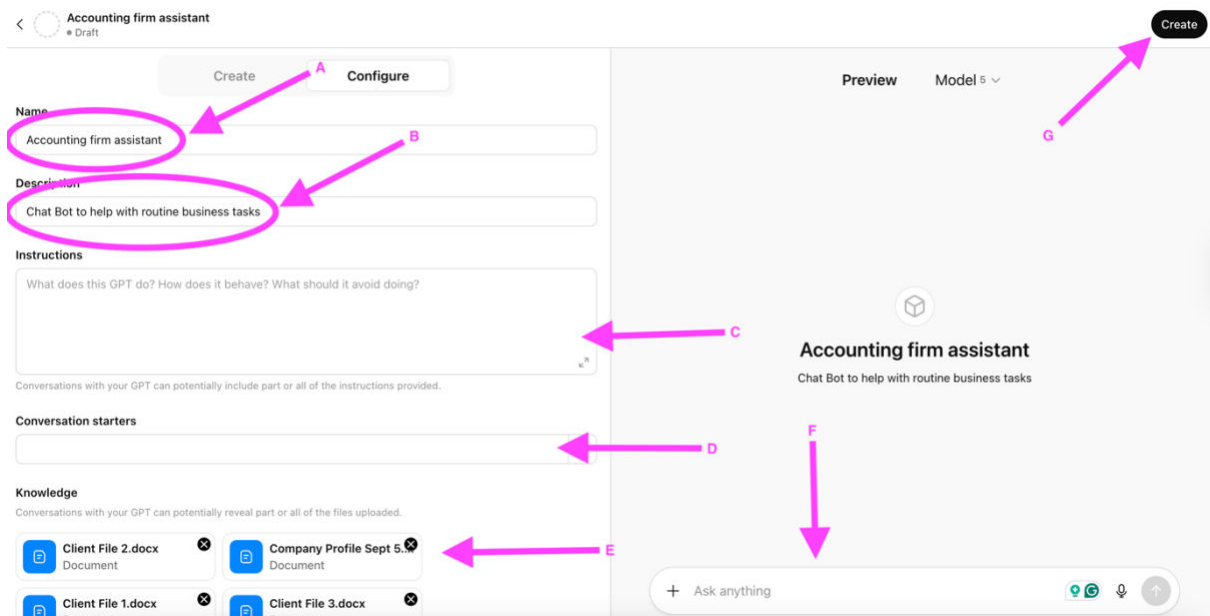
In D, you can add optional Conversation starters, such as frequently asked questions you don't want to retype each time — e.g., tax lodgement cut-off dates.

In E, you can see the uploaded Client files and the Company description file. You can upload additional files later if needed.

In F, you can ask your business questions to test whether the chatbot is performing as expected. If necessary, adjust it by updating the Instructions (C) or uploading more documents.



Finally, when you are ready, press the “Create” button indicated by arrow G.



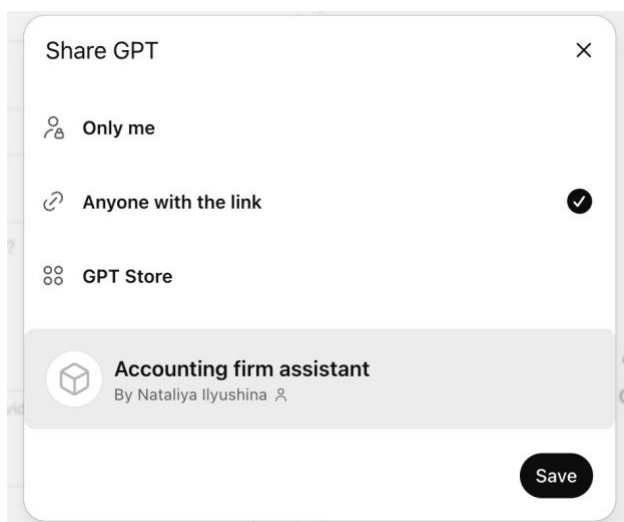
Step 7

After you press Create, the following screen will appear, prompting you to choose how to share your bot.

If you are working with a team, the second option — “Anyone with the link can access” — is usually the best choice.

Avoid sharing the bot publicly (option 3) for security and privacy reasons.

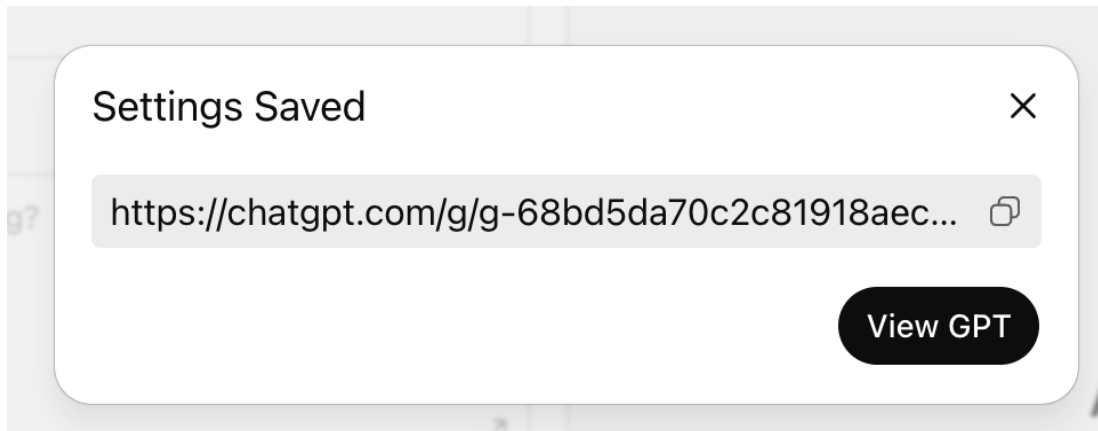
Press SAVE.



TECH FEMME FUSION

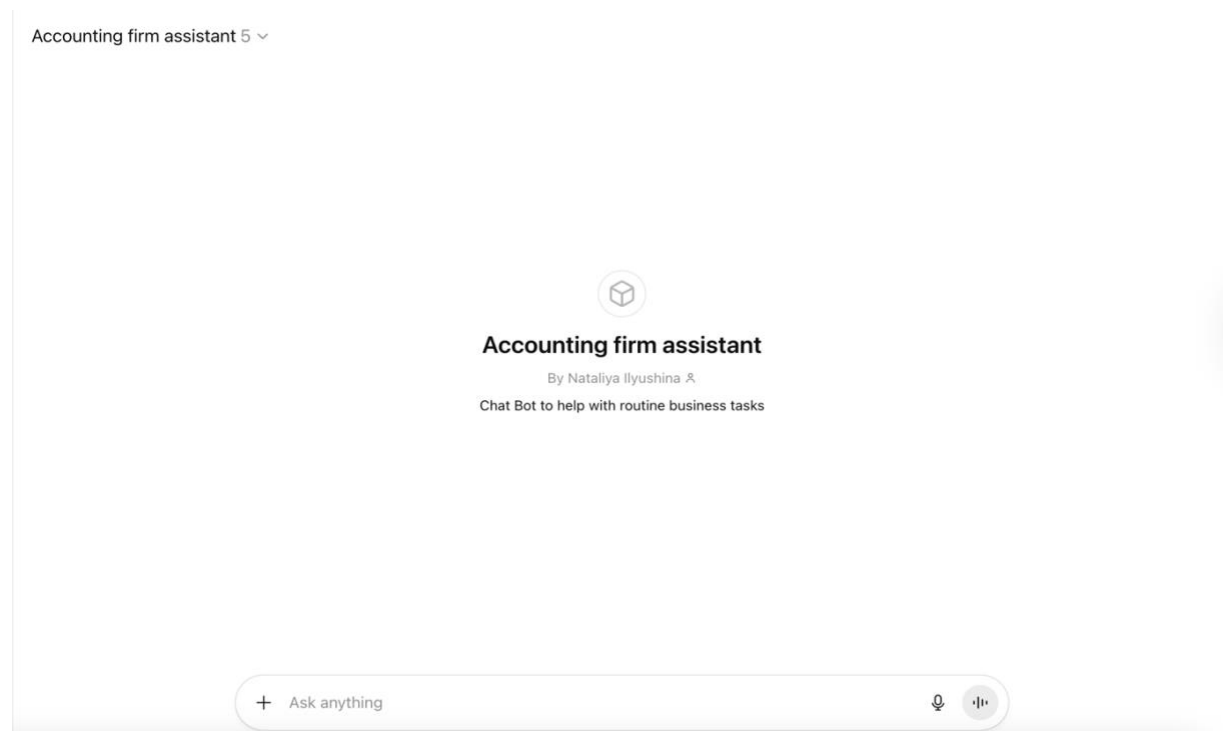
Step 8

Now you can copy the link on your screen and start using your chatbot by clicking View GPT.



Step 9

You have successfully created your own business chatbot. Practice using it — and enjoy!



TECH FEMME FUSION

Copilot capabilities; mapping chat features

Copilot works inside tools you already use, like:

- **Word** (for writing help)
- **Excel** (for formulas, charts, and analysis)
- **Outlook** (for drafting emails)
- **Edge browser** (for summarizing web pages) You don't need to learn a new system — just look for the Copilot icon or prompt bar.

If you use a PC or laptop running on Windows operating system and have the right Microsoft 365 subscription, you'll see Copilot integrated directly into your Excel, that is ready to help with formulas, data analysis, and even building dashboards.

Copilot works on macOS including in Word, Excel, PowerPoint, and Outlook, as long as you have a compatible Microsoft 365 subscription.

Step 1

Open Copilot by following the link:

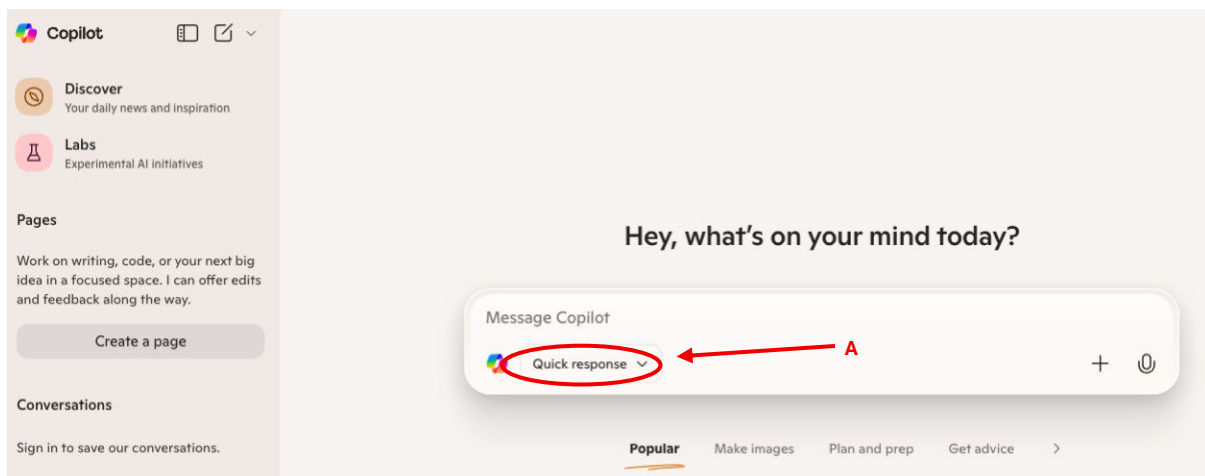
<https://copilot.microsoft.com/>

If you do not have an account, make sure you create one before proceeding to Step 2, so you can unlock more features and set up your chat for your needs.

Copilot chat might look different depending on your subscription.

Step 2

Start typing your message (prompt) in the chat. Then choose your **Copilot conversation modes** by clicking on the icon by the arrow A.



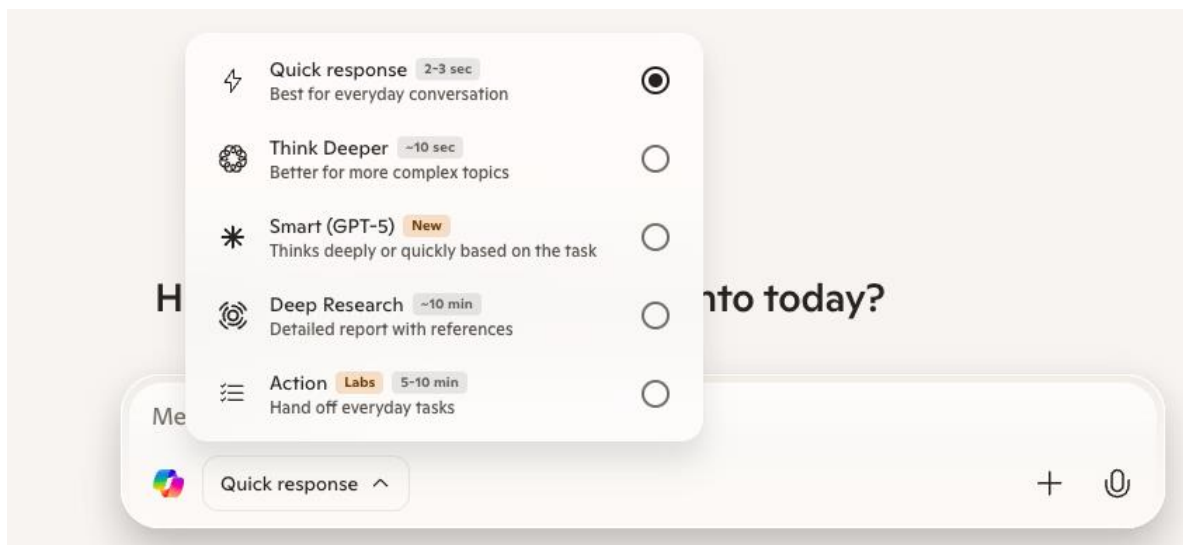
TECH FEMME FUSION

Step 3

Talk to it like you would to a colleague. You don't need fancy tech language. Just type what you want:

- "Summarise this document in 3 bullet points"
- "Create a budget template for a small business"
- "Draft a polite reply to this email"

Copilot understands natural language — no coding required.



1. Quick Response

What it does: Gives you fast, short answers — great for summaries or quick checks.

Example: You ask: "Summarise our Q3 budget performance." Copilot replies with 2–3 bullet points in seconds.

Use it when: You need speed over depth, like prepping for a meeting or scanning a report.

2. Think Deeper

What it does: Copilot takes more time to reason through your question step-by-step.

Example: You ask: "Why did our operating costs spike in Q2?" Copilot breaks down possible causes, trends, and implications.

Use it when: You want thoughtful analysis, not just surface-level answers.

3. Smart (GPT-5)

What it does: Balances speed and depth. It uses advanced reasoning to give polished, well-structured answers.

Example: You ask: "Compare fixed vs variable cost strategies for our 2025 forecast." Copilot gives a clear, executive-style comparison with pros and cons.

Use it when: You want high-quality insights without waiting too long.

4. Deep Research

What it does: Copilot pulls from internal files, live data, and trusted web sources to build a detailed report.

Example: You ask: "Research emerging risks in the APAC financial sector for the next 12 months." Copilot returns a multi-section brief with citations, charts, and summaries.

Use it when: You need external validation, market data, or a research-backed answer.

5. Action

What it does: Turns insights into tasks — like creating charts, sending emails, or building slides.

Example: You say: "Create a PowerPoint with our budget analysis and email it to the CFO." Copilot builds the deck and sends it — no manual steps needed.

Use it when: You want to do something

Use the right mode for the task

If you're using Copilot in the app or web version, you can choose how it thinks:

Mode	Best For	Feels Like...
Quick Chat	Fast answers	Texting a friend
Think Deeper	Thoughtful advice	Talking to a mentor
Smart (GPT-5)	Auto-adjusts to your question	Having a smart assistant
Deep Research	Detailed reports with sources	Hiring a research analyst



Exploring AI tools in practice

For organisations looking to build practical AI skills, **Tech Femme Fusion** offers customised workshops that:

- Explore how tools like ChatGPT and Copilot (or other conversational relevant AI tools) can support your workflows
- Highlight industry-relevant use cases across financial advisory, insurance, accounting, law, compliance, marketing
- Help teams build confidence using AI tools securely and effectively

Ways AI tools can support and adapt to different professional roles:

- Executives considering strategic applications of AI across departments
- Analysts interested in automating reporting and data interpretation
- Financial advisors enhancing client communication and portfolio analysis
- Insurance professionals simplifying claims handling and policy reviews
- Accountants streamlining audits, reconciliations, and financial reporting
- Legal teams drafting documents and navigating regulatory updates
- Compliance and privacy leads understanding AI's role in secure, governed environments
- Marketing teams exploring AI-generated content and audience insights

If your team is curious about integrating AI into daily work, we'd be happy to support your discovery process.

Reach out to book a conversation via olga@techfemmefusion.com.au



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