

NEUEDA DIAGNOSTIC CHECKLIST

15 considerations for **AI upskilling** in financial services

A practical self-assessment for L&D leaders, executive sponsors and transformation teams in regulated enterprises. Use this checklist to identify gaps, prioritise actions and build the internal case for structured AI workforce development.



[illegible]

How to use your results

Mostly Yes:

Your foundations are strong. Focus on deepening capability and scaling adoption.

A mix of Yes and Partial:

You have building blocks in place but critical gaps remain. Prioritise the No items marked High priority.

Mostly No:

You are at an early stage. Start with strategy alignment, governance framing and a role-based capability assessment.

Regardless of where you are, the most common gap we see across regulated enterprises is manager enablement — items 10, 11 and 12. This is the single highest-leverage area for accelerating safe adoption.

Your next step

Visit our AI solutions page:

NeuedAI Accelerate

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