California Lutheran University

School of Management

AI for Faster, Better Finance Teaching

A Live Demo Guide for Finance Faculty

How to use AI to improve both efficiency and instructional effectiveness

Demonstration example: building a Time Value of Money lesson deck

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Session at a Glance

The point of this session is not to master every AI platform. It is to show faculty one simple workflow that saves time, improves a first draft, and still leaves academic judgment where it belongs: with the professor.

Start Here if You Only Remember One Thing

Use this decision rule and move on:

- **Easiest starting point:** Gamma
- **Best overall quality:** Claude + Gamma
- **Best choice if you already live in one ecosystem:** Use Copilot or Gemini inside the tools you already know

What You Will Leave With

- A clear picture of one finance teaching task that AI can speed up right away
- A reusable prompt pattern you can adapt to your own courses
- A short list of guardrails for checking formulas, examples, tone, privacy, and finance-specific assumptions.
- Step-by-step instructions for five different AI tools, so you can choose the one that fits your workflow

How AI Can Make Teaching Better, Not Just Faster

The real payoff is not just speed. Used well, AI can improve how you teach.

- Clarify the sequence of a lesson so ideas build in a cleaner order.
- Generate multiple examples at different difficulty levels for different student groups.
- Rewrite explanations in plainer language when a concept is not landing.
- Turn one lecture into practice problems, review sheets, mini glossaries, and study guides more quickly.

The Core Workflow: Think → Design → Verify

Every method in this tutorial follows the same three-phase pattern. If the tools change, keep the workflow: Think first, Design second, Verify before anything reaches students.

Phase	What You Do	Why It Matters
Think	Generate a slide outline, learning objective, misconceptions to address, examples, and optional speaker notes.	This is where efficiency comes from. You reduce blank-page time and get a structured first draft quickly.
Design	Move the outline into a slide tool to create a visually polished deck with layout, titles, and images.	This is where effectiveness improves. Better visual structure usually means a clearer classroom presentation.
Verify	Edit slides to match your voice, textbook, assumptions, and course level.	This is where faculty expertise matters most. The tool drafts, but you are still the instructor and final editor.

> *AI helps most when you give it a narrow task, a defined audience, and a concrete teaching goal. That is what makes the demo feel useful instead of gimmicky.*

Demo Use Case: Time Value of Money

Throughout this tutorial, every method is demonstrated using the same scenario: creating a 10-slide lecture presentation on the Time Value of Money for an undergraduate Principles of Finance course. This includes present value, future value, compounding, annuities, and a real-world application like loan amortization.

A Prompt Pattern That Travels Well

The quality of AI output depends on the quality of your prompt. The pattern below works across every tool in this tutorial. Memorize the five elements, and you can adapt them to any topic you teach.

Element	What to Specify
Task	What you want created: a slide outline, a lecture deck, an in-class activity, speaker notes, or a study guide.
Audience	Course level, background knowledge, and any assumptions the tool should make about prior exposure to finance.
Goal	What students should know or be able to do after the class session.
Constraints	Slide count, tone, formulas to include, examples to avoid, and whether you want speaker notes.
Output	The format you want back: outline, full deck text, practice problem, glossary, or faculty notes.

Sample Prompt for the TVM Scenario

This is the prompt used in the live demo. You can copy it directly and swap out the topic for your own course.

Reusable Prompt:

Create a 10-slide lecture deck on the Time Value of Money for an undergraduate Principles of Finance class. Audience: sophomores and juniors with little finance background. Goal: by the end of class, students should be able to explain why money has time value and solve a basic present value or future value problem. Include present value, future value, compounding, annuities, one real-world application, and one short practice problem. Use plain language, clear slide titles, and speaker notes. Keep the tone academic but approachable.

Vague vs. Specific: A Quick Comparison

Vague Prompt (Weak)	Specific Prompt (Strong)
"Make a presentation about TVM."	*"Create a 10-slide lecture on the Time Value of Money for undergraduate students with no finance background. Cover PV, FV, compounding, annuities, and include a loan amortization example. End with a practice problem."*

Method 1: Claude Cowork

PHASE FOCUS: THINK | Fast first draft of structure, examples, and notes

Best for: Quick drafts when you need speed and zero design effort.

Time to complete: 2–3 minutes.

What Is Claude Cowork?

Claude Cowork is a desktop feature of Claude (Anthropic's AI assistant) that gives Claude direct access to a folder on your computer. You describe what you need in plain language, Claude asks you clarifying questions, and then it creates files — including PowerPoint presentations — directly in your folder. No copy-pasting, no formatting by hand.

Step-by-Step Instructions

1. **Open Claude Cowork.** Go to claude.ai and open the desktop app. On the left sidebar, click "Cowork."
2. **Select your folder.** Click "Select folder" and choose where you want to save the presentation. Claude creates the .pptx file directly here.
3. **Enter your prompt.** Paste the reusable prompt from page 2 (or write your own using the five-element pattern). Add this line at the end:

Add to the end of your prompt:

Start by using the tool AskUserQuestion, and ask enough context to get the full context. Then, and only then, create a .pptx.

About AskUserQuestion: This is a built-in Cowork tool that makes Claude pause and ask you clarifying questions (e.g., "How formal should the tone be?" or "Do you want speaker notes?") before generating anything. It ensures the output matches what you actually need. This tool is specific to Cowork mode — in a regular Claude chat, Claude will still ask questions, but as plain text rather than a structured widget.

4. **Answer Claude's follow-up questions.** Respond to each clarifying question. This takes about 30 seconds and dramatically improves the result.
5. **Open and edit.** Claude generates the .pptx in your folder within about 60 seconds. Open it in PowerPoint and refine from there.

Tip: There is also a Claude add-in inside PowerPoint (Insert > Get Add-ins > search "Claude by Anthropic"). It sits on the right sidebar and lets you chat with Claude to edit slides directly within PowerPoint.

Strengths and Limitations

Strengths: Excellent content structure, strong research capabilities, creates speaker notes, follows instructions precisely. Great for the Think phase of the workflow.

Limitations: Visual design is basic — minimal graphics, simple layouts, no AI-generated images. Functional, but not polished enough for external audiences.

Rating: Content: A | Design: D

Method 2: Gamma

PHASE FOCUS: DESIGN | Fast visual polish once you know what you want to say

Best for: Fast, polished decks where design matters.

Time to complete: 2–4 minutes.

What Is Gamma?

Gamma (gamma.app) is an AI-powered presentation platform used by over 70 million people. You type a topic, Gamma generates an outline, and then builds a fully designed presentation in about 60 seconds — complete with layouts, typography, spacing, and optional AI-generated images from over 20 models. It exports to PowerPoint, PDF, or Google Slides and generates a shareable web link with built-in analytics (who opened it and how long they spent on each slide).

Step-by-Step Instructions

1. **Go to gamma.app** and create a free account. No credit card required.
2. **Click "Create new" → "Generate."** This opens the AI generation interface.
3. **Enter your prompt.** Paste the reusable prompt from page 2. Be specific — vague prompts produce attractive slides that say nothing.
4. **Review and tweak the outline.** Gamma shows a slide-by-slide outline before building. Reorder, rename, or remove slides as needed.
5. **Pick a theme and hit "Generate."** Choose from built-in themes or use your own branding. Generation takes about 60 seconds.
6. **Edit and export.** Review in Gamma's editor. Export as .pptx or PDF, or share via a web link.

Strengths and Limitations

Strengths: Professional layouts automatically. AI-generated images from 20+ models. Shareable links with view analytics. Exports to PowerPoint, PDF, and Google Slides. Generous free tier; Plus plan is $8/month, Pro is $15/month.

Limitations: Content depth depends entirely on your prompt. Gamma designs; it does not think deeply. If you need research-backed content, pair it with Claude (Method 3).

Rating: Content: C | Design: A

Method 3: Claude + Gamma (Recommended)

PHASE FOCUS: THINK -> DESIGN -> VERIFY | Best end-to-end workflow when quality matters

Best for: Anything that matters. Conference talks, curriculum committee decks, accreditation reviews, and guest lectures.

Time to complete: 8–15 minutes, including research.

Why Combine Them?

Claude excels at thinking: research, analysis, structuring arguments, and producing substantively accurate content. Gamma excels at design: layouts, typography, images, and making everything look polished. Together, you get deep, well-researched content inside a beautifully designed presentation.

Setup: Connect Gamma to Claude

1. In Claude, click the **"+"** button at the bottom of the chat.
2. Select **"Connectors"** → **"Manage connectors."**
3. Find and enable **"Gamma."** This allows Claude to create Gamma presentations directly from your conversation.

Step 1 — Think (Research)

Have Claude conduct thorough research before generating any slides. This ensures the presentation is grounded in accurate, current information.

Research Prompt:

I'm building a presentation. Do not generate slides yet. Research the Time Value of Money for an undergraduate Principles of Finance lecture. My students are sophomores/juniors with no prior finance background. 1. Search the web using at least 5 varied searches (current pedagogical approaches to teaching TVM, common student misconceptions, real-world examples, recent interest rate data, visual teaching methods). 2. Review findings against this goal: students should leave understanding PV, FV, compounding, annuities, and be able to solve a basic TVM problem. 3. Save a structured research brief to research-brief.md — organized by theme, with source URLs and key data points. Prioritize 2025–2026 sources. Flag anything where sources conflict, or data is thin. Start by using AskUserQuestion to make sure you research the right information once you have enough context from me.

What happens: Claude searches the web, synthesizes multiple sources, and saves a structured research document. This takes 1–2 minutes.

Tip: If you have your own materials (lecture notes, textbook excerpts, past slides), drop them into your Cowork folder beforehand. Add "Read all the files in this folder" to the prompt, and Claude incorporates your existing content into the research.

Step 2 — Design (Brief + Generate)

Transform the research into a structured outline and pass it to Gamma in a single follow-up prompt.

Brief + Generate Prompt:

Read research-brief.md and turn it into a Gamma-ready presentation outline. Presentation goal: Students understand TVM concepts and can solve a basic PV/FV problem by the end of the lecture. Audience: Undergraduate sophomores/juniors, no finance background. Visual style: Minimalist design with a clean white background — avoid busy templates, dark themes, or heavy color blocks 1. Write a slide-by-slide outline. Each slide gets: a title, 2–3 key points, and any specific data/stats from the research. 2. Keep it to 10 slides max. 3. Do not write full paragraphs — Gamma will generate the final text. Just give it enough structure and data. 4. Save the outline to gamma-outline.md. 5. Then pass the outline to Gamma as a presentation using textMode "generate." When selecting a theme, choose one that is minimal and light with a white or near-white background.

What happens: Claude creates a detailed outline and sends it directly to Gamma. Gamma builds the full, visually polished presentation using Claude's research-backed structure.

Step 3 — Verify (The 10-Minute Polish)

Open the Gamma link. Go card by card and ask yourself three questions:

- **Would I say this out loud?** Rewrite anything that sounds stiff or generic.
- **Does this card earn its place?** Cut anything that does not add value.
- **Is the data right?** Verify formulas, statistics, and examples. AI can get details wrong.

This final review typically takes 10–15 minutes. The hard intellectual work already happened in Step 1. You are now curating and making it yours.

Rating: Content: A | Design: A

Method 4: Microsoft Copilot in PowerPoint

PHASE FOCUS: DESIGN + REVISION | Best for faculty already working inside PowerPoint

Best for: Faculty already working within the Microsoft 365 ecosystem who want AI assistance without leaving PowerPoint.

Time to complete: 3–5 minutes.

What Is Copilot in PowerPoint?

Microsoft Copilot is an AI assistant built directly into PowerPoint and other Microsoft 365 apps. It can generate entire presentations from a prompt, create slides from Word documents, suggest design improvements, and help restructure content. Everything stays inside the familiar PowerPoint interface.

Step-by-Step Instructions

1. **Open PowerPoint** from Microsoft 365 (desktop or web). You need a Copilot license.
2. **Click the Copilot button** on the Home ribbon to open the side panel.
3. **Enter your prompt.** Use the same reusable prompt. You can also point Copilot at a Word document or outline.
4. **Review and refine.** Ask Copilot to add slides, rewrite content, change layouts, or apply a design theme — all through the chat panel.

Strengths and Limitations

Strengths: Native PowerPoint integration. Leverages your existing templates and themes. Can reference Word documents and other Microsoft 365 files. Good design suggestions via Designer.

Limitations: Requires a Copilot license ($20–$30/month on top of Microsoft 365). Content generation is decent but not as strong as Claude for research-heavy topics. Design is better than Claude alone but not as polished as Gamma.

Rating: Content: B | Design: B

Method 5: Google Gemini in Google Slides

PHASE FOCUS: DESIGN + LIGHT REVISION | Best for faculty already working inside Google Slides

Best for: Faculty embedded in the Google ecosystem who want quick, free AI assistance within Google Slides.

Time to complete: 2–4 minutes.

What Is Gemini in Google Slides?

Google's Gemini AI is integrated into Google Workspace, including Google Slides. It can generate presentations from prompts, create images, and help refine content. If your institution uses Google Workspace for Education, you may already have access.

Step-by-Step Instructions

1. **Open Google Slides** at slides.google.com and create a new presentation.
2. **Open the Gemini panel.** Click the Gemini icon (sparkle) in the toolbar, or use the "Help me create" option.
3. **Enter your prompt** using the same five-element pattern. Gemini generates slides directly within Google Slides.
4. **Edit normally.** Once generated, edit as you would any Google Slides presentation. Use Gemini to generate images or refine individual slides.

Strengths and Limitations

Strengths: Free for many institutions. Familiar Google Slides interface. Real-time collaboration built in. Can generate AI images.

Limitations: Content generation is basic. Design options are limited compared to Gamma. Research capabilities are minimal. Google Slides templates are less sophisticated than PowerPoint.

Rating: Content: C | Design: B−

Tool Comparison at a Glance

You do not need to master all of these. For a short session, choose one primary workflow and mention the others as options.

Tool	Best For	Strengths	Watch-Outs
Gamma	Fast visual decks	Quick, polished layouts from an idea or outline.	Weak prompts produce attractive but shallow content.
Claude Cowork	Reasoning and drafting	Strong structure, examples, speaker notes, and revisions.	Design polish is basic; verify outputs carefully.
Claude + Gamma	Best overall workflow	Research-backed content with professional design.	Takes a bit longer than single-tool methods.
Copilot (PPT)	PowerPoint users	Native integration; builds from prompts or files.	Depends on subscription; features vary by rollout.
Gemini (Slides)	Google Slides users	Slides, images, and rewrites inside Slides.	Design depth is limited; it depends on eligible plans.

Practical Recommendation

Use the decision rule below and move on.

- **Easiest starting point:** Gamma
- **Best overall quality:** Claude + Gamma
- **Best choice if you already live in one ecosystem:** Use Copilot or Gemini inside the tools you already know

Guardrails for Finance Faculty

You are not asking them to trust AI blindly. You are showing them how to use it responsibly.

Finance-Specific Verification Checklist

- Verify every formula and every numerical example before class.
- Check sign conventions, compounding periods, and whether rates are nominal, effective, APR, or EAR.
- Make sure timelines, units, labels, and end-of-period assumptions are consistent across slides.
- Do not rely on AI for current market data unless you verify the source and date yourself.
- Trim generic prose and keep language at the right level for your course.
- Confirm that real-world examples use realistic, current numbers and sensible rate assumptions.
- Confirm whether the setup is an ordinary annuity or an annuity due, and whether cash flows occur at the beginning or end of the period.
- Check whether calculator keystrokes, Excel functions, and hand-calculation steps would produce the same result.

Do / Do Not

Do	Do Not
Use AI for outlines, first drafts, speaker notes, practice problems, and slide cleanup.	Paste in FERPA-protected student information or confidential institutional material.
Use your syllabus, textbook framing, or existing notes to steer the output.	Assume citations, numerical claims, or examples are correct without checking.
Cut slides that do not earn their place.	Keep filler just because the deck looks polished.
Treat the tool like a drafting partner that needs your oversight.	Treat the tool like a substitute for your disciplinary judgment.

> *AI is excellent at getting you moving. It is not the final arbiter of what is accurate, well sequenced, or pedagogically sound.*

Where Faculty Usually See the Biggest Payoff

Before Class

- Draft a lecture deck from a learning objective
- Generate speaker notes or a mini glossary of terms
- Create two or three alternative examples at different difficulty levels
- Build a practice problem set with worked solutions

During Class

- Rewrite a confusing explanation in plainer language on the fly
- Generate a second practice problem if students need another example
- Adapt a concept for a different audience (e.g., MBA students vs. undergraduates)

After Class

- Turn the lecture into a study guide or review sheet
- Create a short formative quiz or discussion prompt
- Draft an FAQ based on common misconceptions from the lesson
- Adapt the same deck for a different section or course level

Quick-Start Checklist

Before the week ends, do one small pilot.

- Within the next week, take one lecture you already teach and rebuild only the first draft with AI.
- **Save one reusable prompt template** for your course using the five-element pattern
- Run the finance verification checklist before anything reaches students.
- **Keep what helps** and ignore what does not — there is no obligation to use every feature
- **Create a free Gamma account** at gamma.app and a Claude account at claude.ai

Action step this week: Bring one existing lecture to your next prep session, run the workflow once, and verify the result before using it with students.

Prerequisites and Costs

Tool	Free Tier	Paid Tier	Notes
Claude (claude.ai)	Yes (limited)	Pro: $20/month	The free tier works for basic use; Pro unlocks Cowork and additional features.
Gamma (gamma.app)	Yes (generous)	Plus: $8/mo, Pro: $15/mo	The free tier covers most needs; the paid tier adds custom branding and analytics.
Microsoft Copilot	No	$20–$30/month	Requires Microsoft 365 subscription plus Copilot add-on.
Google Gemini	Partial	Workspace plans vary	Depends on institutional Google Workspace tier.

Tip: Tool names, interfaces, pricing, and availability change quickly. Before the conference, confirm the exact features you plan to show, and build the live demo around one narrow, reliable use case.

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