

CONVERSATION GUIDE FOR IT PROJECT MANAGERS

Quick Readiness Check for AI-Assisted Delivery

Three 30-minute conversations to find out what your firm already offers — and where your project can start

THE THREE CONVERSATIONS

- 01 AI tools and rules**
What may I use today, and under which rules?
- 02 Delivery toolchain**
How would AI fit into the way we build software?
- 03 Data, platform and controls**
What would a pilot with AI agents need?

Companion to the FINATUM white paper “Agentic Software Delivery in Financial Institutions”.

How to use this guide

This guide helps an IT project manager get a quick, realistic picture of what the firm already offers for AI-assisted software delivery, and therefore where a project can start. It takes three conversations of about 30 minutes each. No preparation by the other side is needed.

	Conversation	Typical partner	Key question
1	AI tools and rules	IT architecture, workplace or AI team; information security or compliance contact	What may I use today, and under which rules?
2	Delivery toolchain	DevOps or developer platform team; a senior developer of your area	How would AI fit into the way we build software?
3	Data, platform and controls	Data or cloud platform team; IT risk or change management	What would a pilot with AI agents need?

Tips

- **Hold them in this order.** If conversation 1 shows that no AI tool is approved yet, conversations 2 and 3 are still useful, but the first step is clear: get the basics approved.
- **Ask how things work in practice**, not only what the policy says. “When did someone last do this?” is a good follow-up.
- **Tick Yes, Partly or No** during the conversation and note names, tools and lead times.
- **Ask for a document or a contact** whenever an answer is “it depends”.
- **Fill in the summary on the last page** straight afterwards. It tells you where your project can start.

Terms used

- **AI assistant:** a chat-style AI tool that drafts, analyses and explains; a person copies the results into project tools.
- **AI agent:** AI that carries out multi-step tasks itself, such as writing code and running tests, under human supervision.
- **Stages A, B and C** (from the FINATUM white paper): A = individuals use an approved assistant; B = teams share templates and workspaces; C = agents work inside company systems on a controlled platform.

01 AI tools and rules

Talk to: IT architecture, workplace or AI team; ideally with a contact from information security or compliance

Goal: Find out which AI tools you may use today, for what kind of data, and how to get anything else approved.

Bring: A short description of your project and two or three tasks where AI could help (e.g. analysing legacy code, writing requirements, designing tests).

#	Question	Answer	Notes
1.1	Is there an approved AI assistant for staff, and how do I get access for my team? e.g. Microsoft 365 Copilot, Claude, ChatGPT Enterprise, Gemini; licence request process	☐ Yes ☐ Partly ☐ No	
1.2	Are AI coding assistants approved for developers, and which ones? e.g. GitHub Copilot, Claude Code, Cursor; official list versus what people use	☐ Yes ☐ Partly ☐ No	
1.3	What data may go into these tools? Code and documentation usually yes; client and personal data usually no	☐ Yes ☐ Partly ☐ No	
1.4	Is there a written AI policy or acceptable-use rule I must follow? Where it is published; who owns it	☐ Yes ☐ Partly ☐ No	
1.5	How do I get a new AI tool or AI use case approved, and how long does it take? Committee, CISO, data protection; typical lead time	☐ Yes ☐ Partly ☐ No	
1.6	Do the contracts with our external partners and contractors allow them to use AI? Important if part of the team is external or offshore	☐ Yes ☐ Partly ☐ No	
1.7	Are there AI pilots in IT I can learn from or join? Contacts, results, templates already built	☐ Yes ☐ Partly ☐ No	
1.8	Has the works council agreed rules for AI tools? In Germany required for tools that can monitor performance	☐ Yes ☐ Partly ☐ No	
1.9	Who is the right sponsor or contact for AI in software delivery? Name and role	☐ Yes ☐ Partly ☐ No	

WHAT YOU SHOULD KNOW AFTERWARDS

Whether your team can start AI-assisted work (stage A) now, under which rules, and whom to ask for anything beyond that.

02 Delivery toolchain

Talk to: DevOps or developer platform team; a senior developer or architect from your area

Goal: Understand how AI-generated work would enter your normal development and review process, and what is missing.

Bring: Your project's repository, ticket board and test approach; any templates you already use.

#	Question	Answer	Notes
2.1	Which source control and build platform does my project use, and is code review mandatory? e.g. GitHub, GitLab, Azure DevOps; branch protection enforced centrally?	☐ Yes ☐ Partly ☐ No	
2.2	Which automated checks run before code is merged? Tests, security and licence scans, quality gates such as SonarQube	☐ Yes ☐ Partly ☐ No	
2.3	Where do developers work, and may they install tools such as AI coding assistants? Local machines, virtual desktops, cloud development environments	☐ Yes ☐ Partly ☐ No	
2.4	Is internet access from developer and build environments restricted? Only via proxy or allow-lists? Which AI services are reachable?	☐ Yes ☐ Partly ☐ No	
2.5	Can pipelines run automated jobs under a technical (service) identity? Needed later for agents working in the pipeline	☐ Yes ☐ Partly ☐ No	
2.6	Where do requirements, tickets and documentation live, and are integrations allowed? e.g. Jira and Confluence (cloud or self-hosted), Azure DevOps; AI connectors permitted?	☐ Yes ☐ Partly ☐ No	
2.7	How are requirements written today? Templates, numbering, acceptance criteria, traceability to tests	☐ Yes ☐ Partly ☐ No	
2.8	How much of our testing is automated, and which test tools are used? e.g. Xray, Tosca, Playwright; regression suites; data reconciliation	☐ Yes ☐ Partly ☐ No	
2.9	Are there project templates or standard setups for new applications? Repository templates, internal developer portal, "golden paths"	☐ Yes ☐ Partly ☐ No	

WHAT YOU SHOULD KNOW AFTERWARDS

Whether your team can work consistently with shared templates (stage B), and how close your toolchain is to supporting AI agents.

03 Data, platform and controls

Talk to: Data or cloud platform team; IT risk or change management (can be two short calls)

Goal: Learn what a small pilot with AI agents (stage C) would need, and who would have to agree.

Bring: A one-paragraph pilot idea, e.g. migrating one report or module, with the systems involved.

#	Question	Answer	Notes
3.1	Does the firm have access to AI models through its cloud provider, and in which regions? e.g. Amazon Bedrock, Microsoft Foundry, Google Vertex AI; EU regions	☐ Yes ☐ Partly ☐ No	
3.2	Is there a central gateway that controls and logs AI usage and costs? Owner; how a project is onboarded	☐ Yes ☐ Partly ☐ No	
3.3	Can my project get masked or synthetic test data, and how long does it take? Test data tools; lead time; rules on production data	☐ Yes ☐ Partly ☐ No	
3.4	Which data platforms does my project touch, and do they offer AI connections? e.g. Oracle, SAP BW or BW/4HANA, Databricks, Snowflake, Power BI	☐ Yes ☐ Partly ☐ No	
3.5	What evidence does the change process require, and could more of it be automated? Change types, change board, sample change record	☐ Yes ☐ Partly ☐ No	
3.6	How does IT risk view AI-generated code under DORA and BaFin's 2026 guidance? Existing assessment; conditions; contact in second line	☐ Yes ☐ Partly ☐ No	
3.7	What logging and audit trail would an AI pilot need to provide? Central logging, retention, internal audit expectations	☐ Yes ☐ Partly ☐ No	
3.8	Is anyone planning a shared platform for AI agents, and who would own it? Platform team, timeline, chance to be the pilot	☐ Yes ☐ Partly ☐ No	
3.9	Would you support a small pilot in our area, and what would you need to see first? Conditions, sponsor, decision path	☐ Yes ☐ Partly ☐ No	

WHAT YOU SHOULD KNOW AFTERWARDS

Whether a pilot is realistic in your area within the next months, what it depends on, and who would sponsor and approve it.

Summary: where can my project start?

Count the answers per conversation and use the table below. The pattern matters more than the totals.

	Yes	Partly	No	Main gap	Contact
Conversation 1: AI tools and rules					
Conversation 2: Delivery toolchain					
Conversation 3: Data, platform and controls					

If you found...	Then your project can...	Level to work at
Mostly No in conversation 1: no approved AI tool, no data rule	Not start AI-assisted work yet. Raise the need with the sponsor and propose that the firm approves one tool and a data rule first.	Firmwide basics first
Yes in conversation 1, mixed in conversation 2	Start stage A now: business rule extraction from legacy code, requirements from workshop notes, test case design, screen prototypes. Keep a human owner for every result.	Your project, within firm rules
Yes in 1 and mostly Yes in 2	Move to stage B: shared templates and workspaces for the whole team; record which results were AI-assisted; collect evidence of benefits.	Your project or department
Yes in 1 and 2, at least Partly in 3, and a willing sponsor	Propose a stage C pilot with AI agents, ideally a contained migration with a clear reference, together with the platform and risk teams.	Your department or domain
Strong technology but IT risk or works council not yet involved	Involve them before going further; agree the rules for the pilot with them.	Firmwide governance

RESULT

Our project can start at: ☐ Stage A ☐ Stage B ☐ Stage C pilot ☐ Not yet: basics needed first

Next step, owner and date: _____