

GENERATIVE AND AGENTIC AI FOR BANKERS



TRAINING DATE
SEPTEMBER 4, 2026

FEE:
PKR 18,000
(Plus Tax)

COURSE CONTENTS

SESSION 1: GENERATIVE AI FOR BANKING PROFESSIONALS

- Understanding Generative AI and Large Language Models
- Difference between traditional AI, Generative AI and Agentic AI
- Prompt engineering for professional banking tasks
- AI-assisted document and policy summarisation
- Research and information extraction using AI
- Drafting reports, memos and executive summaries
- Understanding hallucinations, limitations and verification requirements

SESSION 2: AI FOR DATA, EXCEL AND ANALYTICS

- Using AI with Excel for day-to-day banking analysis
- AI-assisted formula generation and explanation
- Data cleaning and preparation
- Trend and variance analysis
- Financial and operational data interpretation
- Comparative analysis across periods and business units
- Identifying unusual patterns and exceptions
- Generating analytical commentary from data
- Creating management-ready summaries
- Using AI to support dashboards and decision-making

SESSION 3: AGENTIC AI FOR BANKING

- Understanding AI agents in simple business terms
- Difference between AI assistants, workflows and agents
- Core components of AI agents: goals, tools, memory and actions
- How AI agents perform multi-step tasks
- Human-in-the-loop review and approval
- Single-agent and multi-agent concepts

SESSION 4: AI WORKFLOW AUTOMATION

- Introduction to intelligent workflow automation
- Understanding triggers, actions and conditions
- Connecting AI with Excel and structured data
- Automating email and notification workflows
- Scheduled monitoring and recurring tasks
- Approval and escalation workflows
- Designing end-to-end AI-powered banking workflows

SESSION 5: RESPONSIBLE AI, GOVERNANCE AND CONTROL

- Responsible use of Generative AI in banking
- Data confidentiality and privacy
- Handling sensitive financial information
- AI hallucination and misinformation risks

TOOLS

ChatGPT / Claude / Gemini / Microsoft Excel / n8n / AI Agents / No-Code Automation

FACILITATOR

Mr. Irfan Bakaly, who got Pakistan's first Microsoft Most Valuable Professional (MVP) award in Excel category, is also having 20+ years of experience in technology training field and served many institutions & organizations of repute. He is also a YouTuber with an active tutorial channel by the name of "Irfan Wazir Ali" which has more than 525+ videos

 **NIBAF, PAKISTAN
(KARACHI)**

 **9:00 AM - 5:00 PM**

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