NIBAF Pakistan
EMPOWERING FOR EXCELLENCE



Smart Excel, AI & Chatbot Integration for Banking

NOV 10, 2026 | 9 AM TO 5 PM

FEE: PKR 18,000 PLUS TAX

NIBAF, PAKISTAN (KARACHI)

COURSE OUTLINE

Module 1: Smart Excel for Banking Analytics
- Advanced Excel Functions: XLOOKUP, SUMIFS, COUNTIFS, IF and INDEX-MATCH
- Data Cleaning, Validation and Conditional Formatting
- Loan, Deposit, Recovery and Transaction Data Analysis
- PivotTables, PivotCharts and Slicers
- Banking KPIs and Performance Monitoring
- Interactive Banking Dashboard Reporting

Module 2: Power Query & Banking Reporting Automation
- Importing and Consolidating Banking Data from Multiple Sources
- Data Cleaning, Transformation and Standardization
- Introduction to Power Query M Code
- Automating Daily, Weekly and Monthly Banking Reports
- Refreshable Data Models and Reporting Workflows

Module 3: AI-Powered Excel & Banking Productivity
- Introduction to Artificial Intelligence in Banking
- AI-Assisted Excel Formula Generation and Troubleshooting
- AI-Based Financial Data Interpretation
- Prompt Engineering for Banking Professionals
- Generating MIS Reports and Executive Summaries
- AI-Assisted Decision Support and Productivity Enhancement

Module 4: AI Chatbots for Smart Banking Operations
- Tools: Microsoft Copilot | ChatGPT | Claude AI
- AI-Powered Excel Formula Assistance and Data Analysis
- Banking Performance Analysis and Financial Insights
- Automated Report Summarization and Executive Reporting
- Drafting Customer Emails and Professional Communication
- Banking Policies, SOPs and Regulatory Guidelines Analysis
- AI-Assisted Business Documentation and Presentations
- Banking FAQs and Customer Query Management
- Document Comparison and Key Information Extraction
- AI-Powered Decision Support and Productivity Enhancement

Module 5: AI Integration, Workflow Automation & Responsible Banking
- Integrating AI-Generated Insights into Excel Reports
- AI-Assisted Banking Workflow Optimization
- Streamlining Routine Documentation and Reporting Tasks
- Data Privacy, Confidentiality and Responsible AI Usage
- AI Accuracy Verification and Human Oversight
- Best Practices for AI Adoption in Banking Operations

FACILITATOR

Ms. Sumaira Ghouri is an experienced Corporate Trainer, Course Facilitator, Lecturer and Public Speaker. She has more than 12 years' experience and she has trained and taught more than 2500 business professionals. Ms. Ghouri is the First Female Microsoft Office Corporate Trainer in Pakistan.

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