

THE AI FLUENT BANKER

AUGUST 27, 2026 | 9 AM – 5 PM

NIBAF PAKISTAN, KARACHI



COURSE CONTENTS

Module 1: Foundations of Generative AI

Understand the role of Generative AI in banking.

- What Generative AI is, how it reasons, and what it means for banking operations
- From automation to augmentation: AI amplifies every team's capacity to serve clients, report and comply
- How leading financial institutions are embedding AI literacy into front and back office operations
- Your role: banking expert and AI-empowered professional, not a developer or data scientist
- Why AI fluency is now an institutional imperative, not just an IT department concern
- Examples and exercises drawn from across banking, microfinance, and payments.

Module 2: Prompt Engineering for Banking

From vague to precise: prompting for credit memos, client letters, risk notes and equivalent reports.

- Why most prompts underperform, with a live comparison of weak versus well-built prompts
- The CRAFT framework (Context, Role, Action, Format, Tone) for consistently strong outputs
- Hands-on exercises: draft a credit memo, a client follow-up letter and a short compliance summary

Module 3: NotebookLM for Compliance and Policy

Turn circulars and compliance documents into instant, cited insight.

- Upload any circular, policy manual or product term sheet and interrogate it with grounded, cited answers
- Faster compliance and policy review: from hours of manual search to minutes of AI-assisted lookup
- Turn dense regulatory circulars into quick-reference guides, FAQs and talking points
- Live demonstration: a real banking document is uploaded and interrogated in front of participants

Module 4: Claude for Banking Teams

Connectors, Skills and Add-ins: a personalised, role-specific AI assistant.

- Why Claude stands apart: long-document reasoning suited to credit memos, compliance reports and board papers
- Claude Connectors: how grounding AI responses in an institution's own document libraries and policy archives works.
- Claude Skills: build reusable, role-specific assistants such as a Credit Analyst Assistant or Compliance Reviewer
- Claude Add-ins: draft, restructure and refine documents directly inside Word, Excel and PowerPoint

Module 5: Responsible AI in a Regulated Institution

Data privacy, client confidentiality and regulatory governance guidelines.

- Why responsible AI use is every banker's responsibility, not just a compliance function
- Data privacy and client confidentiality: what AI tools can and cannot do with sensitive data
- Practical guidance on appropriate AI use versus what requires compliance approval
- Where SBP regulatory requirements and AI tool use intersect
- Building a responsible AI culture staff will actually follow

Module 6: Your Optional Toolkit

Perplexity, Copilot, Lucidchart AI and more, tailored to your departments.

- Core toolkit covered in every engagement: ChatGPT, Google Gemini, NotebookLM, Claude Connectors, Skills and Add-ins
- Optional toolkit tailored to your institution's priorities: Copilot Add-ins, Perplexity, Google AI Studio, Canva AI, Make.com, Lucidchart AI
- A practical decision guide for choosing the right tool for each banking task

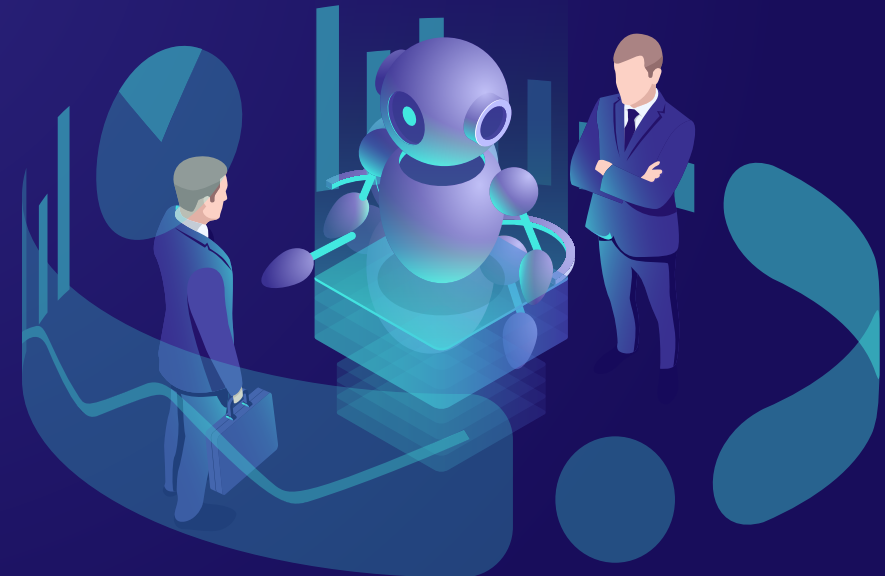
FACILITATOR

Mr. Noor Surani

Trainer | Coach | AI & Automation Specialist

Mr. Noor Surani is a dynamic and forward-thinking professional specializing in Artificial Intelligence, with a particular focus on Generative AI and emerging technologies. He holds an MBA in Management Information Systems and is a Microsoft Certified Trainer, Microsoft Certified Application Specialist, and Certified SCRUM Master.

With extensive expertise in Artificial Intelligence, Robotic Process Automation (RPA), and automation frameworks, Mr. Surani is dedicated to fostering innovation through hands-on training and strategic mentorship. His training philosophy centers on building collaborative, solutions-driven environments that accelerate product development and support seamless digital transformation across industries.



021-35 277 511, 051-9269850



marketing@nibaf.org.pk | registration@nibaf.gov.pk



0303-065 29 63

Training Manager: MR. AZIM ZUBERI
0334-3574499 | azim.zuberi@sbp.org.pk