

unext



manipal
Academy of BFSI



Gen AI & Automation For BFSI Professionals

**Transform Hours Of Work Into Minutes Through An
Extensive Training Program**

Program Snapshot

BFSI professionals spend hours on repetitive tasks such as reporting, compliance, sales decks, and customer communication. Our program trains them to **leverage Generative AI & no-code automation** and integrate them into daily workflows to boost productivity and impact.

Conceptualized for **non-technical BFSI professionals**, the program blends theoretical knowledge with experiential learning modules to enable cutting-edge capabilities in learners.

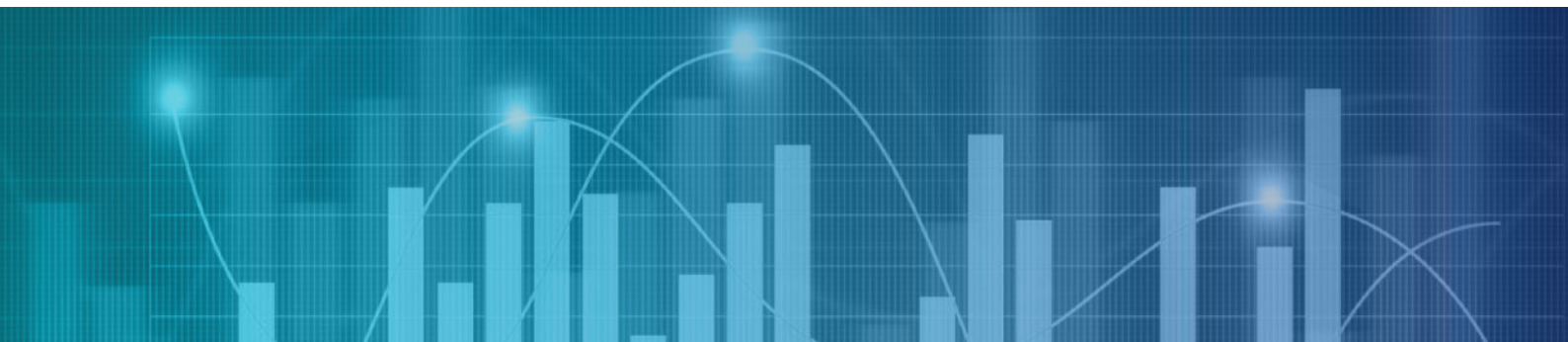
The Impact Of AI Integration In Numbers

Reports reveal that:

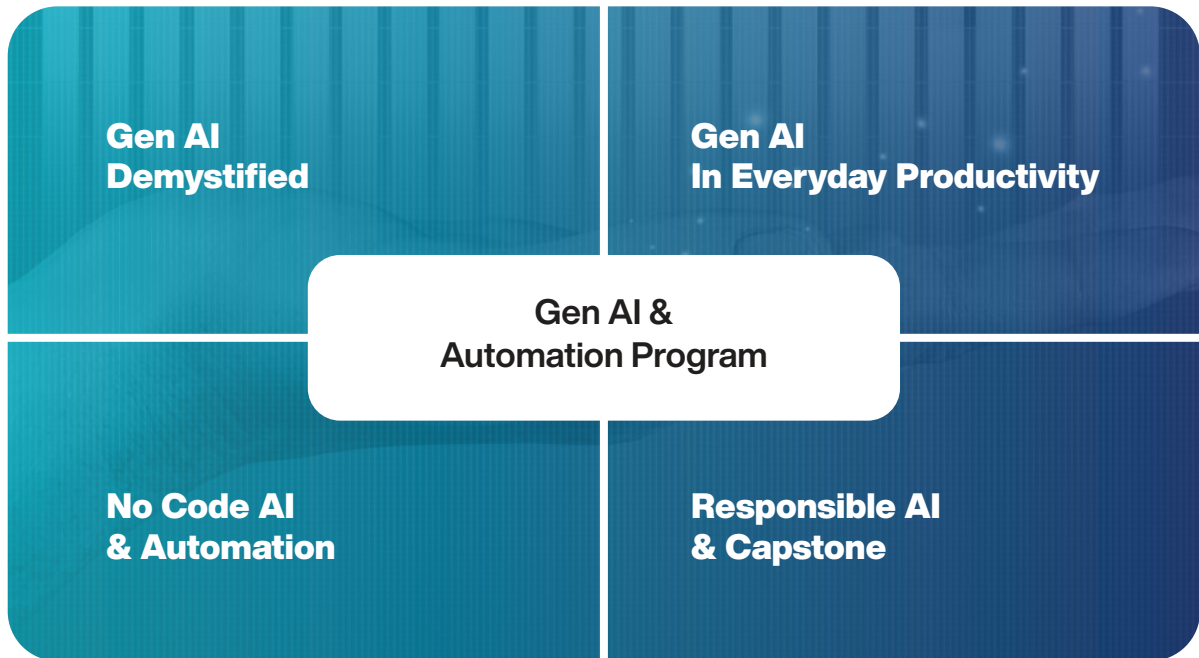
The use of AI in business roles enabled professionals to produce **59%** more documents per hour.

AI assistance in support resulted in a **13%** increase in handling customer inquiries per hour.

Neilson Norman Group's statistics also revealed that organizations that deployed AI witnessed up to **66%** increase in overall productivity.



Key Modules Of The Program



Generative AI Demystified

This module provides a foundational understanding of Generative AI, including

- Prompt engineering frameworks
- A prompt library for BFSI-specific tasks like drafting emails, compliance documents, and sales scripts

Gen AI in Everyday Productivity

In this module, focus is on training professionals to use Gen AI tools like Copilot to:

- Analyze data on Excel
- Generate content on PowerPoint and Word
- Create smart summaries on Outlook and Teams and more

No-Code AI & Automation

This section focuses on implementing agentic AI with tools like Copilot Studio and ChatGPT. You'll also learn to automate workflows using Excel Office Scripts, Macros, and Power Automate.

Responsible AI & Capstone

The final module addresses responsible AI guardrails, outlining the "Dos & Don'ts" of enterprise Gen AI uses. The program culminates with a hands-on approach featuring a capstone lab, where participants redesign a workflow to improve efficiency with AI and automation.



Program Schedule

This intensive 2-day program is a deep dive into emerging technologies such as Gen AI and automation, enabling participants to pick up AI skills for their everyday functions.

Along with expert academic delivery, the program is conducted in fully appointed classrooms and includes lunch with tea/coffee breaks for a seamless learning experience.

Day 1: Generative AI Foundations & Productivity

Session 1 Gen AI Demystified for BFSI

What you'll learn: The big picture and key use cases of Generative AI for banking and financial services, including its applications in Operations, Sales, and Compliance.

Methodology: Presentation

Session 2 Prompt Engineering Frameworks (CSI/FBI)

What you'll learn: How to use proven frameworks to write effective prompts that generate reliable, business-ready outputs. You will participate in guided exercises on creating content like compliance circular summaries, risk reports, and sales scripts.

Methodology: Guided Exercises

Session 3 BFSI Prompt Library & Best Practices

What you'll learn: Best practices for using Gen AI and how to build a library of prompts specifically tailored to roles like Relationship Manager (RM), Operations Manager, and Compliance Officer.

Methodology: Interactive Lab

Session 4 Gen AI in Everyday Productivity Tools

What you'll learn: Hands-on experience with Gen AI tools integrated into Microsoft Office applications. We will cover Excel Copilot for data analysis, auto-generating PowerPoint decks, and using AI for productivity in Outlook and Teams.

Methodology: Hands-on Demos

Session 5

Mini Hands-On Lab

What you'll learn: You will apply your new skills to a practical task: creating a comprehensive client briefing pack using Excel, PowerPoint, and Copilot.

Methodology: Mini Lab

Session 6

Capstone Prep – Part 1

What you'll learn: Teams will be formed to select a real-world BFSI workflow to redesign, such as one for Operations, Sales, or Compliance.

Methodology: Group Work

Day 2: Automation, Agentic AI & Capstone

Session 1

No-Code Agentic AI

What you'll learn: The fundamentals of Agentic AI and how to create your own no-code AI assistants. You'll participate in demos and labs on building a policy Q&A bot or an RM assistant using tools like Copilot Studio and ChatGPT models.

Methodology: Demos & Labs

Session 2

Excel Automation (Office Scripts & Macros)

What you'll learn: How to automate repetitive tasks on Excel to save time. This session includes hands-on exercises to automate MIS reporting and loan calculator sheets.

Methodology: Hands-on Exercises

Session 3

Process Automation Tools

What you'll learn: An overview of powerful process automation tools. You will see demos of Power Automate for tasks like KYC document routing and fraud alerts, as well as an introduction to Zapier/Make.com.

Methodology: Demos

Session 4

Responsible AI & BFSI Guardrails

What you'll learn: A crucial discussion on the "Dos & Don'ts" of using enterprise Gen AI in a compliant manner, with a focus on regulations from the RBI, SEBI, and IRDAI.

Methodology: Discussion

Session 5

Capstone Lab – Part 2

What you'll learn: Working in your teams, you will design a complete AI-first workflow by integrating the prompts, productivity tools, and automation techniques learned throughout the program.

Methodology: Team Lab

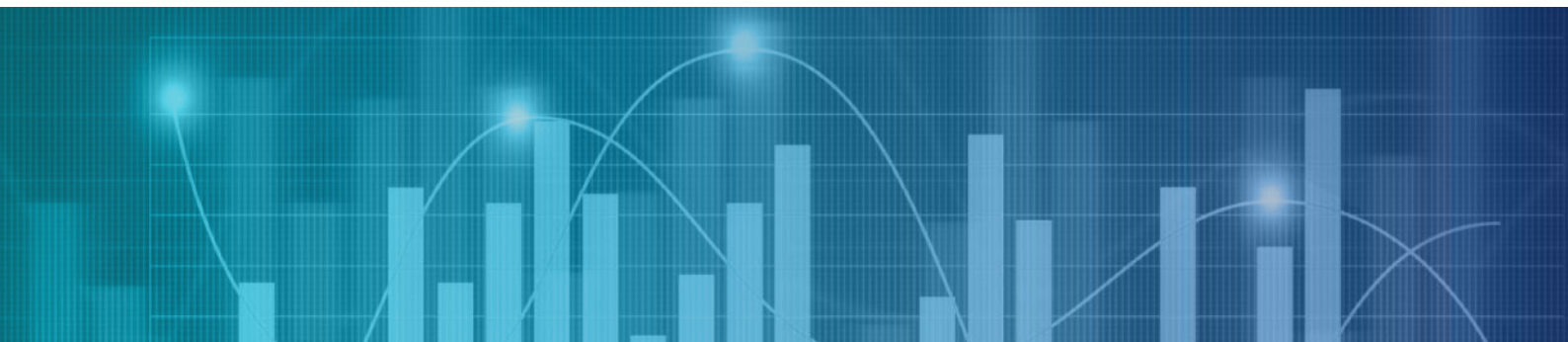
Session 6

Capstone Presentations

What you'll learn: Each team will pitch their redesigned workflow for Operations, Sales, or Compliance to the group.

Methodology: Group Presentations

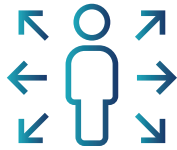
Wrap-up: Q&A, feedback and certificate distribution



Sample Capstone Scenarios



Loan Operations: Use AI to summarize KYC documents, automate Excel calculators, and route approvals to reduce loan processing time



Relationship Manager (Sales): Create AI-first workflows to prepare for client meetings and auto-generate presentations to streamline an RM's day



Compliance & Risk Management: Use Gen AI to summarize new regulations, create a compliance FAQ chatbot, and automate the distribution of updated SOPs



Customer Support: Analyse complaint data with AI, automate complaint routing, and use Gen AI to draft empathetic response templates





Impact & Results

After completing this program, participants will be able to:

- Have a better understanding of Generative AI and its role in BFSI decision-making
- Apply prompt engineering frameworks to get reliable, business-ready outputs
- Integrate Gen AI with productivity tools like Excel, PowerPoint, Outlook, and Teams
- Explore no-code agentic AI tools like Copilot, ChatGPT and Claude
- Automate workflows using tools such as Excel Macros, Power Automate, and Zapier/Make
- Understand and apply responsible AI guardrails for BFSI compliance
- Redesign workflows in a capstone lab to save time and improve impact

About Us

Established in 2008, Manipal Academy of BFSI, a UNext Learning entity and part of the Manipal Education and Medical Group (MEMG), is a premier institution that provides industry-relevant education and training for both freshers and experienced professionals in traditional operations, sales, and new-generation roles within the banking, financial services, and insurance sectors.

With a focus on innovation and learner-centricity, UNext Manipal Academy of BFSI offers a wide range of programs designed to equip individuals with the skills and knowledge to thrive in the BFSI industry.

Today, the academy of BFSI annually trains over 15,000 BFSI industry professionals for its industry partners. With our expertise and deep understanding of market needs, our goal is to create the leaders of tomorrow and build a top-notch workforce for the BFSI industry.



Our Impact Over The Years



**17+ Years
of Legacy**



**1 In 5 Bankers
in India Is Our Alum**



**2,00,000+
Professionals Trained**



**1,00,000+ First-Time
Professionals Trained**



**50+ Client
Partnerships**



**4,000+
Case Studies**



**220+
Experienced Faculty**

To nurture next-gen BFSI
professionals, drop us an email today:
connect@u-next.com

