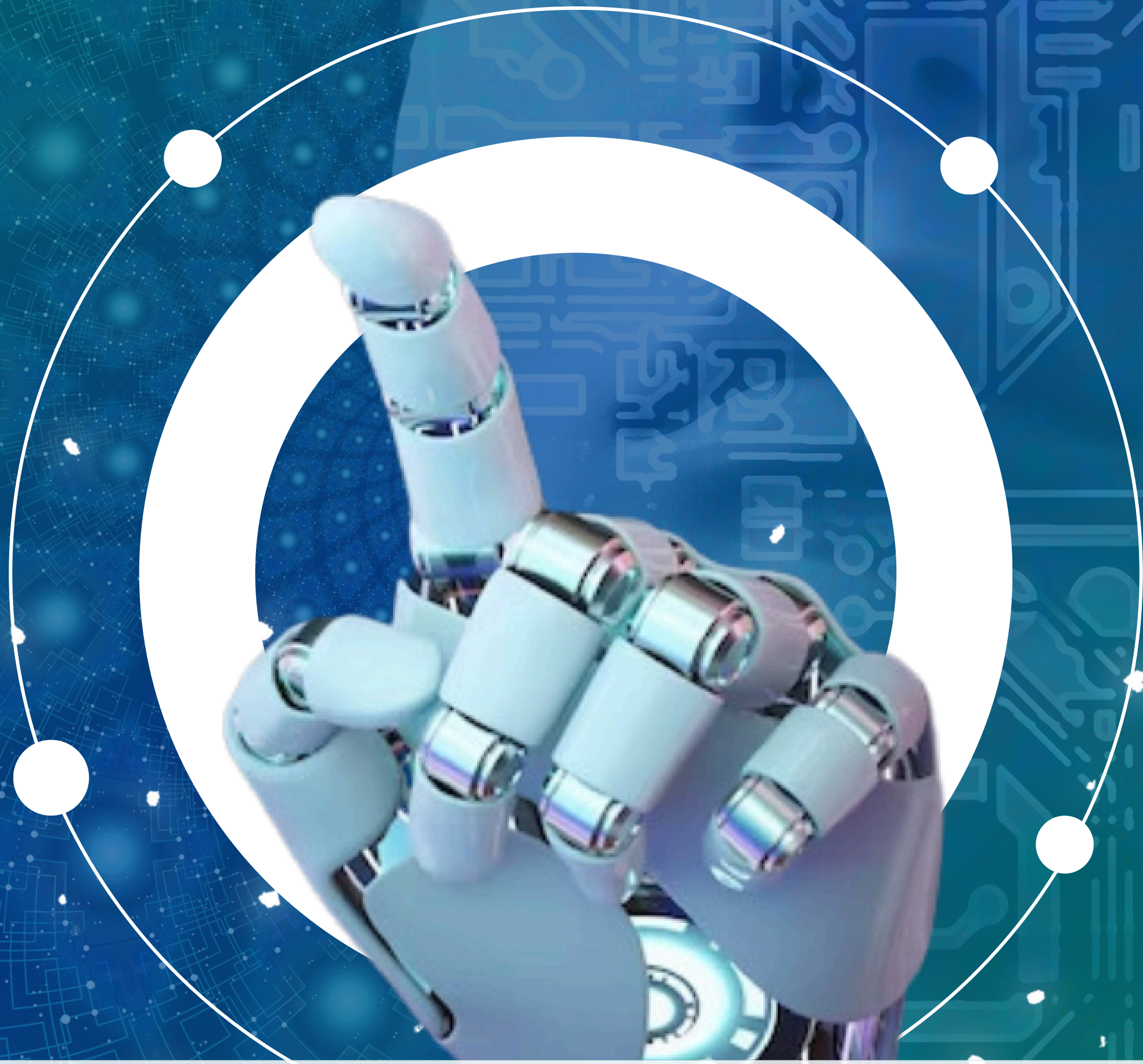


# AI-POWERED

PRODUCTIVITY & AUTOMATION FOR NBFC/  
CAPITAL MARKETS PROFESSIONALS



**MASTER 20+ AI TOOLS TO AUTOMATE  
WORKFLOWS, GENERATE INSIGHTS,  
AND COMMUNICATE SMARTER**

FOR MORE DETAILS  
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# Day 1 – AI for Productivity, Ideation & Business Communication (6.5 Hours)

**Theme:** Leverage Generative AI to accelerate thinking, communication, and decision-making.

MODULE	DURATION	LEARNING OUTCOMES	TOOLS COVERED
<b>Welcome &amp; Setting the Context: AI for NBFCs &amp; Capital Markets</b>	45 MIN	Understand how GenAI can streamline research, reporting, client communication, and regulatory documentation.	Overview of ChatGPT, Gemini, Claude, Perplexity
<b>Generative Content Creation &amp; Ideation for Business Communication</b>	1.5 hrs	Learn to create crisp reports, investor notes, newsletters, and product explainers using AI. Customize tone and compliance-friendly output.	ChatGPT, Claude, Grok 3, Perplexity, even DeepSeek
<b>Visual &amp; Presentation Design Using AI</b>	1.5 hrs	Generate presentations, infographics, client proposals, and explainer visuals in minutes.	Google Gemini, Gamma AI, Midjourney, Idiogram
<b>AI for Research, Summarization &amp; Knowledge Mining</b>	1 hr	Convert PDFs and research papers into summaries, podcasts, and mind maps; track business-impact news.	NotebookLM, Perplexity, Google Gemini
<b>Building Brand &amp; Marketing Collaterals using AI</b>	1 hr	Generate logos, social media creatives, reels, and video explainers for investor relations or product marketing.	ChatGPT-4 (DALL·E), Sora, Kling AI, Runway ML, Pica Labs, Heygen
<b>Wrap-up &amp; Q&amp;A</b>	30 mins	Reflection, recap, and use-case sharing	—

# Day 2 – AI for Automation, Agentic Workflows & Business Operations (6.5 Hours)

**Theme:** From productivity to autonomy – build your own AI agents and automated workflows.

MODULE	DURATION	LEARNING OUTCOMES	TOOLS COVERED
<b>Managing Teams &amp; Workflows with AI Productivity Suites</b>	1 hr	Learn to streamline meetings, tasks, SOPs, and daily communication using AI-native systems.	Notion, Loom, Todoist
<b>Autonomous AI Agents &amp; Voice Workflows</b>	1.5 hrs	Learn how to create AI agents that can call customers, summarize conversations, and automate feedback collection.	VAPI, Eleven Labs, Heygen
<b>Agentic AI Frameworks – Build &amp; Automate Processes</b>	1.5 hrs	Hands-on creation of simple AI agents to automate document parsing, meeting follow-ups, or task reminders.	n8n, Make, AI Agent from scratch
<b>Technical Deep Dive – Building your own RAG &amp; Custom AI Models</b>	1 hr	Learn structured prompt engineering and fundamentals of RAG (Retrieval Augmented Generation) using Google AI Studio.	Google AI Studio
<b>AI for Performance, HR, and Organizational Agility</b>	45 mins	Learn to use AI to simplify goal-setting, reviews, and coaching cycles.	Betterworks
<b>Capstone Exercise: “My AI Co-Worker”</b>	45 mins	Participants design and present a use case applying at least 3 tools to automate a real work scenario (e.g., report generation, client updates, meeting minutes from their respective teams).	Any 3 (minimum) chosen tools

### Program Objectives / Outcomes

By the end of this 2-day program, participants will be able to:

- 1. Use AI as a cognitive co-pilot** for writing, research, and idea generation.
- 2. Design visually engaging content** – reports, presentations, and visuals using multimodal AI.
- 3. Automate repetitive workflows** and communication tasks with agentic AI frameworks.
- 4. Build AI agents** that can take actions – from calling customers to managing feedback cycles.
- 5. Understand RAG and prompt engineering** fundamentals for enterprise-ready AI integration.
- 6. Adopt AI tools responsibly** within the compliance and data security boundaries of an NBFC.