Generative AI for Head Office Employees Training

Duration: **1 Day**

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Generative AI is rapidly transforming how employees access information, create content, analyze documents and manage everyday tasks. When used effectively, AI can improve productivity across a wide range of activities, from writing emails and preparing reports to summarizing meetings and conducting research.

The **Generative AI for Head Office Employees** training program helps participants understand how Generative AI and Large Language Models (LLMs) work and how to use AI tools **effectively, productively and safely** in their daily workflows.

In addition to fundamental concepts, the program focuses on practical Generative AI use cases adapted to the banking environment.

Who Should Attend

All Head Office Employees

What You Will Learn

By the end of the training, participants will be able to:

- Explain the basic principles of Generative AI and LLMs.
- Understand the capabilities and limitations of AI-generated content.
- Recognize hallucinations and apply methods for validating AI outputs.
- Use AI for everyday tasks such as emails, reports, summaries, research and document analysis.
- Understand key data security principles when using Generative AI in a banking environment.
- Identify tasks and workflows that can benefit from AI assistance.

Training Outline

Module 1 — Understanding Generative AI

- What is Generative AI and how does it work?
- Understanding Large Language Models (LLMs)
- How does AI generate responses and content?
- Strengths and limitations of Generative AI
- What are AI hallucinations?
- Validating and quality-checking AI-generated outputs

Module 2 — Generative AI for Everyday Work

Practical applications of Generative AI for Head Office employees:

- Writing professional emails and business communications
- Summarizing long texts and documents
- Structuring meeting notes and extracting action items
- Preparing and improving business reports

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- Creating presentation outlines and content
- Research and information synthesis
- Brainstorming and generating alternatives
- Document analysis and information extraction

Module 3 — Generative AI Use Cases in Banking

Participants explore practical banking-related scenarios, including:

- Analyzing customer complaints and identifying key themes
- Creating executive summaries and action items from meeting notes
- Summarizing internal banking policies
- Simplifying complex management reports
- Comparing products according to defined criteria
- Creating project plans and task lists with AI assistance

Module 4 — Safe Use of Generative AI in Banking

- Considerations when providing banking data to AI tools
- Protecting confidential and corporate information
- Personal data and data privacy
- Using approved enterprise AI tools
- Reviewing and validating AI-generated outputs
- Human oversight and accountability for final decisions

Workshop — “Redesigning My Workday with AI”

Participants select **five tasks from their daily work** and explore how each task could be improved or optimized with Generative AI.

For each task, they identify where AI can provide support, potential time and productivity benefits, associated risks, and where human oversight remains necessary.

By the end of the workshop, participants create a practical**personal AI use map** tailored to their own role and daily responsibilities.