Prompt Engineering for Banking Training

Duration: **1 Day**

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Overview

The quality of results produced by Generative AI tools depends significantly on the quality of the instructions—or **prompts**—provided to them. In banking, where accuracy, consistency and reliability are particularly important, effective prompt design is becoming an essential AI skill.

The **Prompt Engineering for Banking** training program helps participants communicate more effectively with AI tools and generate more accurate, consistent and useful outputs for business processes such as analysis, reporting, regulatory review, customer communication and content creation.

Who Should Attend

Employees Who Actively Use AI Tools

What You Will Learn

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

- Understand the core components of an effective prompt.
- Design prompts tailored to specific tasks and use cases.
- Apply techniques such as zero-shot, few-shot, structured prompting and prompt chaining.
- Define constraints and output formats to generate more consistent AI responses.
- Analyze and improve ineffective or incomplete prompts.
- Build reusable prompts tailored to their own banking functions.

Outline

Module 1 — Anatomy of an Effective Prompt

The essential building blocks of effective prompt design:

- **Role:** Defining the expertise or perspective AI should adopt
- **Context:** Providing relevant background and information
- **Task:** Clearly defining what the AI is expected to do
- **Constraints:** Establishing rules, boundaries and requirements
- **Output format:** Specifying whether the result should be a report, summary, table or another structured format
- **Examples:** Guiding the model by demonstrating expected outputs

Module 2 — Prompt Engineering Techniques

- Zero-shot prompting
- Few-shot prompting
- Structured prompting
- Prompt chaining for breaking complex tasks into manageable steps

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- Iterative prompting for progressively improving results
- Managing context, scope and output requirements

Module 3 — Prompt Engineering Use Cases in Banking

Participants practice prompt design through banking-related business scenarios, including:

- Credit analysis and structuring information
- Analyzing and summarizing risk reports
- Reviewing regulatory and policy documents
- Classifying and analyzing customer complaints
- Preparing internal communications
- Summarizing and simplifying management reports
- Adapting marketing content for different target audiences

Module 4 — Improving Ineffective Prompts

Participants are given examples of incomplete, ambiguous or poorly designed prompts and identify why they fail to produce the expected results.

They redesign these prompts by improving the role, context, task, constraints and output format, and compare different approaches to understand how prompt design affects output quality.

Workshop — “Banking Prompt Library”

Participants create **5–10 reusable professional prompts** for their own roles and business functions.

Each prompt is reviewed in terms of task definition, context, constraints and expected output. By the end of the workshop, participants will have created a practical **Banking Prompt Library** that can be used and further developed in their daily work.