AI Agents ve Agentic Banking Training

Duration: **1 Day**

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AI Agent technologies are transforming Artificial Intelligence from a tool that primarily responds to user requests into systems capable of **planning multi-step tasks, using tools and executing processes** toward defined objectives.

The **AI Agents and Agentic Banking** training program helps participants understand AI Agents and Agentic AI and explore how these technologies can be applied across banking operations, customer service, lending, risk management and executive workflows.

The program also addresses how AI Agents should be governed in terms of authorization, security, human oversight and auditability.

Who Should Attend

Digital, Technology, Operations, Product, Innovation Teams and Managers

What You Will Learn

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

- Explain the differences between Chatbots, Copilots and AI Agents.
- Understand the concepts of Agentic AI and Agentic Banking.
- Understand how AI Agents use tools and execute multi-step tasks.
- Identify potential AI Agent use cases across banking processes.
- Evaluate the importance of Human-in-the-Loop approaches.
- Understand agent authorization, security, audit and error management principles.
- Design a basic banking AI Agent use case.

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Training Outline

Module 1 — What Is an AI Agent?

- Chatbot vs. Copilot vs. AI Agent
- What is Agentic AI?
- Goal-oriented and task-oriented AI systems
- Tool use: connecting AI Agents with enterprise tools and systems
- Multi-step task and process execution
- Human-in-the-Loop and human approval
- Defining agent authority and responsibility boundaries

Module 2 — AI Agent Use Cases in Banking

Potential Agentic AI scenarios across banking functions:

- **Operations Agent:** Supporting repetitive operational processes
- **Customer Service Agent:** Analyzing, routing and supporting the resolution of customer requests
- **Credit Agent:** Supporting information gathering, document review and lending processes
- **Risk Agent:** Monitoring risk signals and supporting risk analysis
- **Executive Assistant:** Supporting reports, meetings, information and action management
- **IT Support Agent:** Analyzing user requests and accelerating support processes

Module 3 — AI Agent Governance

- Defining agent roles and permissions
- Controlling access to systems and data
- Human oversight and approval for critical actions
- Security and data privacy
- Audit trails and traceability of agent activities
- Managing errors, exceptions and unexpected agent behavior
- Monitoring agent outputs and actions

Workshop — “Design a Banking AI Agent”

Participants select a real or sample banking process and design an**AI Agent use case** for that process.

For the proposed Agent, participants define:

- Its role and objective
- Data sources it can use
- Systems and tools it can access
- Actions it is authorized to perform
- Decision points and authority boundaries
- Steps requiring human approval
- Essential security and control mechanisms

By the end of the workshop, participants create a practical Agentic Banking scenario that balances business value with **security, control and human oversight**.

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