BPP
LYCEUM EDUCATION GROUP

AI for Banking Professionals

Bring AI into banking work, **with customers in mind.**

Designed by banking experts. Delivered by AI experts.

Apply AI to the work you already know

- Live, instructor-led training
- Applied to real banking work
- Foundational and Practitioner levels
- From single tasks to a workflow
- Guided practice and expert review

Be better prepared for what comes next

Apply AI to banking research, customer preparation and operational processes, building skills you can use across your role.

Why this matters now

A useful client conversation, case decision or process step starts with understanding the information available and what may still be missing. AI can help you research an issue, bring relevant details together and develop more useful first drafts. These courses give you practical ways to use it across banking work, while keeping customer context, sensitive information and responsibility for decisions firmly in view.

Course 1

Foundational

Use AI more effectively in individual tasks

Work you'll recognise: preparing a client meeting brief; checking AI answers about customer data against permitted records.

You'll leave able to

1. **Use AI for client research, case summaries and draft communications, then check sources and omissions**
2. **Test AI answers about customer, risk or market data against permitted records**
3. **Keep customer decisions with you, protect sensitive information and challenge unsupported conclusions**

Course 2

Practitioner

Use AI to connect multiple tasks into a workflow

Work you'll recognise: mapping onboarding information from approved knowledge to human hand-off; testing missing data and exceptions.

You'll leave able to

1. **Pick a useful AI step in onboarding and map its inputs and human decisions**
2. **Build and test a guided prototype on approved content, including missing data and exceptions**
3. **Explain the access, escalation and logging a workplace pilot would need**

At a glance

Learn

10 hours over two days
Live online and instructor-led

Apply

Within two weeks
In the workplace
One approved task based on real banking work
Instructor feedback

Review in group

1 hour group clinic
Live online and instructor-led
Shared peer learnings

Ongoing support

Templates, checklists and case examples available from day one, plus 90 days of support.

Ways to join

Courses run in cohorts of 15 learners.

Have enough people for a full cohort? Train your team together, on your own banking work and review standards. We can even explore tailoring.

Not quite enough people, or want to test it first? Talk to us about your team's needs.

£7,000
Full closed cohort

Cost is per course. Prices exclude VAT.

What you'll learn

Practical skills to bring AI into your role, whatever your starting point.

Course 1: Foundational

You'll learn to use AI on the task in front of you, and check the answer before you rely on it.

1. Gain confidence with AI in banking

Know where AI adds value and where human judgement is needed, from credit and suspicious-activity detection to everyday drafting.

2. Use AI for everyday banking work

Prepare for client meetings, draft accurate case notes and speed up client, sector and credit research.

3. Use AI tools with banking data

Understand transactional, customer, KYC, risk and market data, and frame clear questions on churn, credit risk and customer behaviour.

4. Use AI responsibly in banking

Keep sensitive data out of unapproved tools, validate outputs, spot AI-enabled threats and maintain records in line with regulatory requirements.

Course 2: Practitioner

You'll learn to design, build and test AI-supported banking workflows, assistants and agents, with human approval before anything is released.

1. Design AI-enhanced banking workflows

Pick the right banking tasks for AI, assess readiness and value, and design clear human-AI hand-offs.

2. Build and monitor banking AI workflows

Build repeatable workflows from approved knowledge and templates, then prove reliability and value with acceptance criteria and monitoring.

3. Deploy AI assistants and agents

Ground a customer-service assistant in approved knowledge and coordinate onboarding and KYC steps with human review.

4. Run multi-agent systems

Coordinate agents across fraud and risk monitoring, preserve customer context across hand-offs and keep errors from cascading.

Who it's for

Roles

Banking professionals, including operations teams, relationship managers and client support, regardless of seniority or time in role.

Starting knowledge

Complete an AI skills diagnostic before the course begins to benchmark your current capability.

Foundational requires no previous AI experience. Practitioner is for people who already use and check AI on individual tasks.

Not sure which course?

Course 1: Foundational
"I want to use AI better on the task in front of me."

Course 2: Practitioner
"I already use AI confidently on tasks, and now want it to create AI-driven processes and workflows."

Choose by your AI experience, not your seniority.

Time and support

Learn live for 10 hours

Training, guided labs and feedback take place over two days. Materials available from day one, no advance study is required.

Apply one task

Within two weeks, try a suitable task using an approved tool and permitted information, or use a supplied case. Keep your reviewed work and a question for the instructor.

Return with your questions

Join a one-hour group clinic around day 30. Use the templates, checklists, worked cases and feedback for 90 days.

See your progress

Ongoing capability diagnostics show where your skills and confidence are growing, and where to explore and practise next.

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Not sure where AI fits in your work?

Here's what you could learn to do.

Foundational

Prepare an AI-supported client meeting brief

- Give AI a bounded research and briefing task, then refine its questions
- Check the facts and omissions before you share it
- Keep customer decisions with you

Practitioner

Prototype AI support for onboarding information

- Combine approved knowledge, AI-generated process help and human hand-offs
- Test missing data, errors and exceptions
- Specify access, escalation and logging

Why learn this with BPP?

Lecture
See an example explained

Lab
Try it in practice

Review
Review your result with an expert

Our accelerated learning framework moves learners between focused instruction, hands-on application and structured reviews. Built on practice, feedback and repetition, it turns knowledge into reliable, in-role performance.

A trusted learning partner to the financial services sector for almost 50 years.

Delivering training programmes to all 10 leading global investment banks.

Skills partner to 500 financial services organisations, including many exclusive relationships.

Is AI adoption a whole workforce priority?

From everyday work to building AI tools and leading AI decisions, our training covers every level. Connect pathways across apprenticeships, degrees, certifications and short courses, so your people strategy keeps pace with your AI strategy.

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