

Agentic AI for Business

CPD : 44
HOURS



Saturday & Sunday
Class commences from
14 November 2026



11:00 am – 1:00 pm (PKT)



Via Zoom

Register Now



111-000-422



www.icap.org.pk



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About

The Institute of Chartered Accountants of Pakistan (ICAP) is a prestigious regulatory body with a proud history of providing chartered accountancy qualification, and investing in professional growth and development of its members. ICAP by Digital Assurance & Accounting Board (DAAB), is introducing a comprehensive hands-on training program on Agentic AI in 2026, designed to equip professionals with the knowledge and practical skills to harness AI-driven automation and intelligent decision-making in business and professional environments.

The course is designed for professionals seeking to leverage Agentic AI in finance, audit, and other business functions. It aims to equip participants with the knowledge and practical skills to understand, develop, and implement AI agents that can automate complex workflows, support informed decision-making, and enhance operational efficiency.

The program emphasizes Agentic AI fundamentals, intelligent automation, AI-driven decision-making, and the practical application of AI tools to real-world business challenges. Its modules are structured progressively, moving from foundational concepts to the design, development, and implementation of AI agents, enabling participants to explore how autonomous and goal-oriented AI systems can transform business processes. The course also incorporates practical sessions to reinforce learning and provide hands-on experience in applying Agentic AI to professional scenarios.

By the end of the session, you will be able to:

- Understand the fundamentals of Agentic AI, its architecture, capabilities and applications in business environments.
- Differentiate between Generative AI and Agentic AI and identify their potential use cases.
- Design and develop AI agents to automate business processes and workflows.
- Apply AI tools and frameworks to build intelligent, goal-oriented agents.
- Integrate AI agents with business tools and data sources to streamline operations.
- Automate repetitive tasks and enhance workflow efficiency through intelligent automation.
- Apply Agentic AI to practical scenarios in finance, audit, accounting and other business functions.
- Implement multi-agent systems to address complex business challenges through collaborative AI.
- Evaluate AI-generated outputs and assess the reliability, accuracy and effectiveness of AI agents.
- Identify ethical, security, governance and risk considerations in deploying Agentic AI solutions.

Modules

Module
12



Alternatives,
Cost Discipline &
Open-Source Models



Checking a plugin
Before you trust it

Module
11

Module
10



Risk, Ethics and
AI Governance



Business
Communication

Module
9

Module
8



Customizing & Integrating
the Finance Plugin



Automating Workflows
with Skills and Agents

Module
7

Module
6



The Finance plugin
in Cowork



Problem Solving
with General Agents

Module
5

Module
4



Cowork -
The general agent



Claude in Excel

Module
3

Module
2



AI Prompting for
Finance Professionals

Module
1



Introduction to Agentic AI
& the Agent Factory Thesis

Details	Mastering Intelligent Automation with Robotics and Artificial Intelligence
CPD Hours	44
Class room	42 Hours
Practice Session	02 Hours
Dates	Classes commence on 14 November, 2026 (Tentatively)
Time	Online via Zoom Saturday - Sunday: 11:00 AM to 01:00 PM (PKT) (ICAP management reserves the right to change the schedule due to sudden holiday or for unforeseen reasons)
Course Pre-Requisite	Students have to acquire license of Claude AI Tool - US\$20 subscription per month
Course Guidelines	Participants are required to keep their cameras turned on throughout all live lectures for attendance purposes. Recorded lectures are provided for learning and revision only and will not be counted towards the live attendance requirement. A minimum of 75% attendance in live sessions is mandatory to be eligible for the assessment. Training certificates will be awarded only to participants who successfully meet the attendance and assessment requirements.
Marking Criteria	During the classes graded Assignments and capstone Project will be marked. The Final MCQ Assessment will be proctored via Portal at the end of the course.

Who Should Attend

- This course is tailored for Chartered Accountants, finance professionals, auditors, tax consultants, business professionals and risk management experts. It is ideal for both beginners and intermediate-level professionals with a foundational understanding of financial and operational processes.
- Given the target audience, the course will focus on use cases and activities specifically related to finance, accounting, auditing, taxation, risk management, and compliance. However, once participants become proficient with the Cowork and Claude, they will be equipped to apply it to a wide range of tasks, whether in finance and accounting or other areas such as business operations, marketing, sales, quality assurance, HR, and beyond.

Learning Outcomes

- Distinguish the model itself from the products wrapped around it: chat apps, the API, and agent products such as Cowork and Claude in Excel.
- Tell the three waves of AI apart, predictive, generative and agentic, and recognise which wave any finance tool belongs to.
- Clean messy data, extract data from PDFs, build pivot tables and charts, fix formula errors, and construct working spreadsheets from a blank sheet, all in plain English.
- Prompt well: give Claude the right context, name sheets and ranges clearly, and refine across a conversation rather than expecting a single perfect answer.
- Verify the agent's output before relying on it, and recognise where a finance professional's review is non-negotiable.
- Navigate every part of the Cowork interface, and know what each control does.
- Set the three controls on every task – folders, connectors and approvals – and review the agent's wider reach so it matches the risk.
- Understand how AI tools reads PDFs, Excel and Word, and where to be careful with each.
- Run five realistic finance tasks through the full task loop: brief, plan, review, approve or redirect, execute, verify.
- Drive an agent to act, not advise, and to return structured artefacts (tables, schedules, schemas) rather than paragraphs.
- Verify the agent's output against a trusted source as a standing step, and recognise when a result only looks right.
- Run the full set of skills – the three financial statements, all five journal-entry types, reconciliation, variance analysis and SOX testing – on a sample dataset.

Module 1

Introduction to Agentic AI & the Agent Factory Thesis



3 waves of AI



Prompting for finance



9 ideas – three parts

Module 2

AI Prompting for Finance Professionals



3 Retrieval modes



Talking to AI well



Working safely & choosing tools

Module 3

Claude in Excel



Claude in Excel



Power features & finance applications



Working responsibly with Claude on finance data

Module 4

Cowork – The general agent



The co-work interface option by option



Task loop-your first task end-to-end



Extending co-work

Module 5

Problem Solving with General Agents



The seven principles



The general agent reliability

Module 6

The Finance Plugin in Cowork



Installing the finance plugin in Cowork



Anatomy of finance plugin

Module 7

Automating Workflows with Skills and Agents



Setting up your agent



Authorize your own skill



Automating a finance workflow

Module 8

Customizing & Integrating the Finance Plugin



Localizing the plugin



Connecting approved integrations

Module 9

Business Communication



Branded Decks
with Claude in
PowerPoint



Polished reports
with Claude in
word



One flow across
application

Module 10

Risk, Ethics and AI Governance



Governance &
the trust



Matching oversight
to risk and auditable
record



AI Governance

Module 11

Checking a plugin before you trust it



Methods



Inspection lab



Reliability

Module 12

Alternative, Cost Discipline & Open Source Models



The engine market:
alternatives, cost and
due diligence



Ecosystem

Payment Details & Registration Confirmation

Members / Affiliates / Students

Fee: PKR 80,000 plus tax

Non Members Fee: PKR 95,000 plus tax

To ensure a smooth and transparent registration process, participants are requested to carefully review the payment and confirmation guidelines outlined below.

Accepted Payment Modes

Payments can be made only through the following modes:

01 Cheques / Pay Orders

Please make all cheques and pay orders payable to Institute of Chartered Accountants of Pakistan (ICAP).

Prior to dispatch, share the following details:

- **Participant Name**
- **Email Address**
- **Course Name**
- **Membership Status**
- **Registration Number (R#), if applicable**
- **Phone Number**
- **Designation**
- **Organization**

Submit all details at: daab@icap.org.pk

Please note that 7% Withholding Tax (WHT) is applicable to training services.

After withholding, kindly share the relevant CPR.

The withheld amount will remain outstanding until the CPR is provided.

02 Online Portal Registration

Participants may also register and make payments through the official online portal:

<https://member.icap.org.pk/online-registration-for-seminar-workshop/>

Important Notes

- Registrations will be confirmed only upon receipt of full payment and complete participant details.
- Incomplete submissions or missing payment proof may result in delayed or unconfirmed registration.

Cohort Freezing & Transfer Policy

- A fee of **PKR 20,000** will be applicable for freezing or transferring a cohort.
- In the absence of this payment, the registration will be considered lapsed.
- Each registration may be transferred to a maximum of two (2) cohorts only.

Disclaimer

Participants are responsible for sharing valid payment proof along with complete and accurate details at daab@icap.org.pk immediately after making the payment. The institute will not be responsible for any delay, non-confirmation, or lapse in registration resulting from late submission, missing information, or incorrect details. Registration processing is strictly subject to timely receipt of complete documentation.

Register Now

<https://member.icap.org.pk/online-registration-for-seminar-workshop/>

For Further Inquiry or Details:

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