The Institute of Chartered Accountants of Pakistan

ICAP

Agentic AI for Business

COHORT 02

CPD HOURS : 44

Tuesday & Thursday
Class commences from
December 2026

07:00 pm – 10:00 pm (PKT)

Online
Via Zoom

Register Now



About

The Institute of Chartered Accountants of Pakistan (ICAP) is a prestigious regulatory body with a proud history of providing the chartered accountancy qualification and investing in the professional growth and development of its members. Through its Digital Assurance & Accounting Board (DAAB), ICAP is introducing Agentic AI for Business, a comprehensive hands-on training programme, in 2026. AI has moved beyond answering questions. It can now do real work, and the way professionals work is changing with it. Those who stand out will be the ones who know how to put AI to work, and how to stay accountable for what it produces. This programme shows you how to create and manage your own AI Worker: an AI that takes on a recurring task from your job, follows your rules, runs on schedule and stops for your review before anything is final. No coding is required. The modules build step by step: from how AI works and how to brief it well, through hands-on work in Excel, Word and PowerPoint, to giving your AI Worker your firm's knowledge, skills and limits, and governing it responsibly. Every session is practical and built on realistic finance, audit and business scenarios. You finish with a working AI Worker for a real task from your own job, and the judgement to check, trust and sign off its work.

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

- Explain what changes when AI moves from answering questions to doing the work, and what that means for your review and sign-off.
- Identify the recurring tasks in your own job that an AI Worker can take on, and the ones that must stay with you.
- Brief AI clearly, so that it returns finished, usable work rather than a rough first draft.
- Create an AI Worker for a recurring task, without coding, and give it your firm's knowledge, rules and approved skills.
- Set what your AI Worker may and may not do, and the points where it must stop for your approval.
- Schedule your AI Worker to run on its own and report back for your review.
- Review and verify work you did not watch, and recognise when a result only looks right.
- Produce reports, schedules and presentations that are ready for review and signature.
- Diagnose and fix an AI Worker when it goes wrong, and keep its cost under control.
- Apply governance, ethics, confidentiality and security controls so that AI is used responsibly in your organisation.

Modules

Module 12

Alternatives, Cost Discipline & Open-Source Models

Module 11

Checking a plugin Before you trust it

Module 10

Risk, Ethics and AI Governance

Module 9

Business Communication

Module 8

Customizing & Integrating the Finance Plugin

Module 7

Automating Workflows with Skills and Agents

Module 6

The Finance plugin in Cowork

Module 5

Problem Solving with General Agents

Module 4

Cowork - The general agent

Module 3

Claude in Excel

Module 2

AI Prompting for Finance Professionals

Module 1

Introduction to Agentic AI & the Agent Factory Thesis

** Module titles and content are subject to change in line with curriculum revisions and updates.*

Details	Agentic AI for Business
CPD Hours	44
Class room Practice Session	42 Hours 02 Hours
Dates	Classes commence in December, 2026
Time	Online via Zoom Tuesday - Thursday: 07:00 PM to 10:00 PM (PKT) (ICAP management reserves the right to change the schedule due to sudden holiday or for unforeseen reasons)
Language	Majorly conducted in English
Course Pre-Requisite	Students would need to acquire license of Claude AI Tool (~ US$20)
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

One outcome for each module. Together they take you from your first brief to a working AI Worker you can trust, check and hand over.

Distinguish AI that answers questions from an AI Worker that does the work, and know what each means for your professional sign-off.

Understand where an AI answer comes from, and brief AI with the right context, format and checks so that the first result is usable.

Use Claude in Excel to analyse data, reconcile figures and build workbooks in plain English, checking the cited cells behind every answer.

Run a task end to end in Cowork (plan, run, review and sign off) with folders, connectors and approvals set to match the risk.

Review work you did not watch: recompute the key numbers, check the sources and spot results that only look right.

Install the Finance plugin and use it to prepare close and reporting work such as reconciliations, journal entries and variance analysis.

Turn a recurring task into an approved skill, and schedule your AI Worker to run it and stop for your approval.

Give your AI Worker your firm's knowledge, including Pakistan-specific rules, and connect it only to approved data sources.

Produce board packs, reports and presentations in Word and PowerPoint, with every figure reconciled to the source workbook.

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Decide whether to trust a plugin or skill before you use it, by testing it on normal, incomplete and must-refuse cases.

Diagnose a failed run, fix it, manage usage and cost, and hand your AI Worker over with documentation a colleague can run from.

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

Trainer Profiles

Zia Khan combines expertise in accounting, finance and business with more than three decades of experience in software development and technology leadership. He holds master's degrees in business administration, engineering and accountancy from Arizona State University, USA.

His career includes developing financial and business software, consulting in Silicon Valley, and teaching financial accounting, cost accounting and financial management. He has also helped students prepare for *CPA, CMA and CFA examinations*.

He has helped lead major technology education initiatives in Pakistan, including the Presidential Initiative for Artificial Intelligence and Computing (PIAIC) and the Governor of Sindh's technology education initiative. His honours include Pakistan's *Tamgha-e-Imtiaz* and *Microsoft's Most Valuable Professional Award for eight consecutive years*.



Zia Khan

CPA (USA), CMA (USA) | MBA, MSE, MAcc (USA)
Agentic AI Architect | Educator | Recipient of Tamgha-e-Imtiaz

For more than 18 years he has redesigned business processes and led operations, including work alongside McKinsey and IBM consultants at PTCL and on a USAID utilities project. His work starts from how a business actually runs: where processes break, and where AI can make a measurable difference.

As co-founder and CEO of Panaversity, he co-designed its agentic AI programmes, and he has trained more than 1,000 professionals and developers to build and deploy AI agents. He is also co-author of The AI Agent Factory, a practical guide to building AI Workers and AI-native businesses. He believes AI Workers earn their place through measurable results, with human judgment and accountability built into every task they take on.



M Rehan ul Haq

Claude Certified Associate
Foundations (CCAO-F) | BE(Electrical), MBA
Co-founder & CEO, Panaversity | Agentic AI Architect | Co-author, The AI Agent Factory

Payment Details & Registration Confirmation

Members / Affiliates / Students
PKR 80,000
plus tax

Non-Members
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:

UAN: 92 (021) 111-000-422 ext. 354-406 | WhatsApp # 92-301-5039776
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