OXI AI ACADEMY

Business Process Course Catalogue

Practical AI courses for working business professionals

Choose a course that matches the work you handle. Each business domain offers one generic course and five process courses at each of three learning levels. The catalogue contains 90 separate business courses across 25 process pathways.

Business domains	Process pathways	Process courses	Generic courses
5	25	75	15

Choose the course that fits your responsibility

A generic domain course applies core AI methods to one broad work request. A process course develops a specific responsibility in greater depth, such as lead qualification, complaint tracking or invoice review. Choose the relevant course; you do not need to complete all six choices at a level.

Course level	Capability you develop
AI Productivity	Create and check a useful report, document, analysis or communication.
AI Assistant Builder	Build and test reusable instructions or an assistant for a recurring process.
AI Workflow Builder	Connect inputs, AI steps, checks, exceptions and human review in a tested prototype.

Progress through the learning levels

AI Essentials is required once before business courses. Complete AI Productivity before AI Assistant Builder, and both before AI Workflow Builder. Workflow Builder also requires AI Knowledge Lab. Your course plan confirms the relevant prior learning for your selected process; completed platform courses are reused.

Training and assessment

Every listed business course provides 8 training hours, one assessed project and one OXI AI Academy certificate after successful assessment. Each course allocates 1.5 hours to theory, 3.5 to guided practice, 2 to project work and 1 to Q&A, submission and assessment. Hours exclude breaks.

Labs use prepared data, reference material and templates. Choose Microsoft Copilot, Gemini, ChatGPT or Claude; exercises are matched to available features. Workflow courses produce scoped training prototypes. Live system connections require suitable access and an agreed implementation scope.

Your enrolment plan confirms selected course codes, prerequisites, training hours, certificates, fees and any software costs. Existing bundle terms apply only to the courses listed in that plan. Training dates are confirmed for selected courses.

COURSE DIRECTORY

Find your business process

Each numbered process below has a dedicated course at every level. The generic domain course is listed separately on each level page.

Business domain	Five process pathways	Course pages
Sales & Operations	01 Lead Generation and Prospect Research 02 Lead Qualification and Prioritisation 03 Pipeline and Follow-up Management 04 Proposal and Quotation Preparation 05 Sales Performance and Forecast Review	Productivity 3 Assistant 4 Workflow 5
Customer Relationships	01 Complaint Ticket Management 02 Customer Query and Knowledge Support 03 Service Commitments and Escalation 04 Customer Renewal Follow-up 05 Customer Feedback Analysis	Productivity 6 Assistant 7 Workflow 8
Business Reporting & Operations	01 Weekly Performance and KPI Reporting 02 Backlog and Exception Management 03 Work Allocation and Handover 04 SOP Knowledge and Process Guidance 05 Meeting Decisions and Action Tracking	Productivity 9 Assistant 10 Workflow 11
Finance & Accounting	01 Receivables Follow-up 02 Invoice Verification and Payables Exceptions 03 Expense Claims and Policy Review 04 Budget Variance and Management Commentary 05 Bank Reconciliation and Cash Record Review	Productivity 12 Assistant 13 Workflow 14
HR & Recruitment Administration	01 Recruitment Coordination 02 Employee Onboarding Documentation 03 HR Policy Queries 04 Leave and Attendance Record Review 05 Learning and Training Coordination	Productivity 15 Assistant 16 Workflow 17

Shared platform courses

Course	Training	Purpose
AI Essentials	8 hours	Introduction to AI, effective prompting, response checking and everyday use of the selected platform.
AI Knowledge Lab	8 hours	Work with reference documents, check supporting sources and prepare reusable knowledge for assistants and workflows.

These two shared courses sit outside the 90 business-course count. Complete each only once where required. A process pathway is the same responsibility studied across the three levels; the catalogue is a menu of course choices, not a compulsory programme.

01 / SALES & OPERATIONS

AI Productivity

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
AI for Everyday Sales Work **SAL-P00** Generic domain course	Turn a sales manager's request into a clear AI task; Provide product context and an appropriate output format; Draft a short internal sales brief from supplied notes; Check facts, unresolved questions and proposed next actions.	**Project:** A checked sales briefing pack for one sample customer enquiry. **Assessment:** Trace each factual statement to the supplied enquiry or product information.
AI Prospect Research and Lead Generation **SAL-P01** Process course 01	Define target organisation criteria and useful research questions; Evaluate a supplied set of public business sources; Separate verified prospect facts from assumptions and missing information; Prepare relevant prospect briefs and first-contact drafts.	**Project:** A research pack covering five sample prospect organisations, with source references and reviewed outreach drafts. **Assessment:** Verify source support and target-fit reasoning for every prospect in the pack.
AI Lead Qualification and Priority Review **SAL-P02** Process course 02	Define qualification criteria for an existing lead register; Identify buying needs, timing, constraints and missing information; Apply an agreed qualification rubric consistently; Prepare priority explanations and the next qualification questions.	**Project:** A checked qualification register for ten sample leads, with priority reasons and unanswered questions. **Assessment:** Reconcile every priority with the agreed rubric and flag insufficient evidence.
AI Pipeline Review and Follow-up Planning **SAL-P03** Process course 03	Interpret opportunity stages and entry or exit conditions; Check last-contact dates, owners and next-action fields; Identify stalled opportunities and inconsistent records; Draft a follow-up plan linked to interaction history.	**Project:** A pipeline review and follow-up plan for a sample opportunity register. **Assessment:** Check that every proposed action has evidence, an owner and a suitable follow-up date.
AI Proposal and Quotation Preparation **SAL-P04** Process course 04	Extract requirements and unanswered questions from an enquiry; Match requirements to supplied product specifications; Use approved prices, quantities and commercial terms; Check calculations and draft a clear proposal for review.	**Project:** A proposal and quotation draft for one sample enquiry, with a requirement-to-offer checklist. **Assessment:** Verify quantities, prices and terms against source records; identify unmet requirements.
AI Sales Performance and Forecast Review **SAL-P05** Process course 05	Check periods, definitions and totals in sample sales records; Compare actual sales with targets and prior periods; Review a supplied forecast calculation and its assumptions; Prepare evidence-based commentary and review questions.	**Project:** A checked sales review brief with actual-versus-target results, forecast changes and an assumptions log. **Assessment:** Recalculate key figures and distinguish observed results from forecast assumptions.

Return to course directory

01 / SALES & OPERATIONS

AI Assistant Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Build a Sales Work Assistant **SAL-A00** Generic domain course	Define one repeatable internal sales-briefing task; Configure instructions using product notes and a response template; Set rules for missing information and unsupported claims; Test consistency across routine and incomplete enquiries.	**Project:** A reusable assistant that prepares internal sales briefs from sample enquiries. **Assessment:** Test three unfamiliar enquiries and verify that missing information is requested rather than invented.
Build a Prospect Research Assistant **SAL-A01** Process course 01	Structure offering information and target organisation criteria; Create source-led research instructions and a prospect-brief format; Require evidence links and explicit unknowns; Test relevance, source quality and unsupported claims.	**Project:** A prospect research assistant with a five-case test log and source-checking rules. **Assessment:** Verify that unsuitable prospects and unsupported facts are flagged in the test cases.
Build a Lead Qualification Assistant **SAL-A02** Process course 02	Translate an agreed qualification rubric into assistant instructions; Define the minimum information needed to assess a lead; Generate priority reasons and follow-up questions; Test ambiguous, incomplete and conflicting lead records.	**Project:** A lead qualification assistant with a decision rubric and a documented test set. **Assessment:** Confirm repeatable rubric application and appropriate escalation when evidence is incomplete.
Build a Pipeline Follow-up Assistant **SAL-A03** Process course 03	Provide pipeline stage rules and interaction-history fields; Generate concise opportunity summaries and next-action drafts; Prevent unsupported promises and invented interaction history; Test stage conflicts, missing owners and overdue actions.	**Project:** A pipeline assistant that drafts opportunity summaries and follow-up actions from sample records. **Assessment:** Check action relevance, history accuracy and handling of incomplete opportunity records.
Build a Proposal Preparation Assistant **SAL-A04** Process course 04	Organise approved product, pricing and commercial references; Define a proposal template and requirement-matching rules; Separate draft wording from verified commercial calculations; Test missing specifications, conflicting terms and unsupported offers.	**Project:** A proposal assistant with a reference pack, review checklist and tested enquiry cases. **Assessment:** Check that unsupported terms and missing requirements trigger questions or review flags.
Build a Sales Review Assistant **SAL-A05** Process course 05	Provide metric definitions and checked spreadsheet outputs; Generate consistent commentary from supplied sales comparisons; Require explanations to cite figures and forecast assumptions; Test period mismatches, missing targets and anomalous results.	**Project:** A sales review assistant with a commentary template, metric dictionary and validation log. **Assessment:** Verify cited figures and ensure the assistant does not invent causes or forecasts.

Return to course directory

01 / SALES & OPERATIONS

AI Workflow Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Build a Sales Request Review Workflow **SAL-W00** Generic domain course	Map one enquiry from intake to internal sales brief; Structure required inputs and completeness checks; Connect AI drafting with a human review step; Test correction, approval and record-retention branches.	**Project:** A small enquiry-to-brief workflow prototype with a review record and operating instructions. **Assessment:** Demonstrate the normal route and an incomplete-enquiry route without bypassing review.
Build a Prospecting Preparation Workflow **SAL-W01** Process course 01	Map prospect intake, research and source verification; Apply target-fit checks and duplicate-organisation detection; Prepare outreach drafts for human approval; Track research status, exceptions and approved outputs.	**Project:** A prospecting workflow prototype connecting research inputs, verification, outreach drafting and a tracking register. **Assessment:** Test duplicate and poorly evidenced prospects; confirm outreach remains subject to review.
Build a Lead Qualification Review Workflow **SAL-W02** Process course 02	Structure lead intake fields and completeness checks; Connect rubric-based assessment with explanation and review; Route incomplete or conflicting records for clarification; Record qualification decisions and their supporting evidence.	**Project:** A lead qualification workflow prototype with an evidence log and clarification branch. **Assessment:** Demonstrate consistent routing for qualified, incomplete and conflicting sample lead records.
Build a Pipeline Follow-up Workflow **SAL-W03** Process course 03	Map opportunity updates, ownership and next-action status; Apply supplied follow-up timing and escalation rules; Prepare reminders and action drafts for review; Track completion, stalled opportunities and exception handling.	**Project:** A pipeline follow-up prototype with status tracking, reminder drafts and an escalation register. **Assessment:** Test overdue, ownerless and completed opportunities without creating duplicate follow-up actions.
Build a Proposal Approval Workflow **SAL-W04** Process course 04	Map enquiry intake, requirements and document preparation; Connect reference selection with deterministic price checks; Route exceptions and commercial terms to human approval; Track document versions, revisions and release status.	**Project:** A proposal workflow prototype linking requirement checks, draft preparation and approval records. **Assessment:** Show that missing specifications or unapproved terms prevent a proposal from being marked ready.
Build a Sales Review Preparation Workflow **SAL-W05** Process course 05	Map input files, reporting periods and validation checks; Use spreadsheet calculations for metrics and forecast comparisons; Connect AI commentary with evidence and management review; Track corrected inputs, versions and unresolved assumptions.	**Project:** A sales-review workflow prototype with checked calculations, commentary, exception handling and a review record. **Assessment:** Test a changed source total and a period mismatch; verify the review pack updates correctly.

Return to course directory

02 / CUSTOMER RELATIONSHIPS

AI Productivity

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
AI for Everyday Customer Service **CRM-P00** Generic domain course	Turn a customer request into a clear service task; Provide product or service context without unnecessary personal data; Draft a response and an internal handover note; Check accuracy, tone, unanswered questions and next actions.	**Project:** A checked response and handover pack for one sample customer request. **Assessment:** Verify factual accuracy and ensure the response makes no unsupported service commitment.
AI Complaint Analysis and Ticket Review **CRM-P01** Process course 01	Define complaint categories and required ticket fields; Check missing information, duplicate cases and ownership; Review ticket age, priorities and recurring complaint types; Prepare a complaint summary and evidence-based action list.	**Project:** A checked complaint report and action list from a sample ticket register. **Assessment:** Reconcile category counts and verify the reason, owner and evidence for each priority.
AI Customer Answers from Service Knowledge **CRM-P02** Process course 02	Organise current product and service references; Locate evidence relevant to a customer's question; Draft clear answers with source references; Recognise outdated, conflicting or missing information.	**Project:** A response pack for ten sample customer questions, with evidence references and escalation notes. **Assessment:** Trace each answer to a current source and flag questions the references cannot resolve.
AI Service Commitment and Escalation Review **CRM-P03** Process course 03	Interpret supplied response targets and escalation rules; Check timestamps, due dates and status completeness; Use spreadsheet calculations to identify approaching or missed commitments; Prepare a queue-level exception report with ownership.	**Project:** A checked service-commitment report showing due, overdue and unresolved sample cases. **Assessment:** Verify deadline calculations and match every escalation to the supplied service rules.
AI Customer Renewal Preparation **CRM-P04** Process course 04	Review contract dates and supplied renewal terms; Summarise relevant service history and unresolved issues; Identify missing information requiring account-owner review; Prepare renewal briefs and follow-up drafts.	**Project:** A renewal preparation pack for five sample customer accounts. **Assessment:** Verify renewal dates and terms; distinguish documented concerns from unsupported assumptions.
AI Customer Feedback and Theme Analysis **CRM-P05** Process course 05	Prepare anonymised feedback and identify duplicate entries; Define themes and distinguish multiple issues in one response; Connect summaries to supporting customer comments; Check theme counts and prepare service-improvement questions.	**Project:** A feedback analysis brief with a theme register, evidence excerpts and checked counts. **Assessment:** Verify theme assignments against comments and reconcile counts with the analysed dataset.

Return to course directory

02 / CUSTOMER RELATIONSHIPS

AI Assistant Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Build a Customer Service Assistant **CRM-A00** Generic domain course	Define one repeatable customer-response preparation task; Supply service references and a response structure; Set tone, uncertainty and escalation rules; Test routine questions and incomplete requests.	**Project:** A reusable service-response assistant with a short test log and review checklist. **Assessment:** Confirm source-backed answers and appropriate handling of missing information across unfamiliar requests.
Build a Complaint Triage Assistant **CRM-A01** Process course 01	Translate complaint categories and priority rules into instructions; Use service policy to suggest routing and response drafts; Identify missing case information and escalation needs; Test ambiguous complaints and conflicting descriptions.	**Project:** A complaint triage assistant with case tests, source references and correction records. **Assessment:** Check category consistency and ensure uncertain cases are flagged for human review.
Build a Customer Knowledge Assistant **CRM-A02** Process course 02	Structure a small current product and service knowledge pack; Require answers to identify their supporting references; Handle conflicting versions and questions outside the knowledge pack; Test paraphrased questions and misleading assumptions.	**Project:** A customer knowledge assistant with a reference index and a tested question set. **Assessment:** Verify source accuracy and refusal to invent answers absent from the reference pack.
Build a Service Escalation Assistant **CRM-A03** Process course 03	Provide service targets, ownership rules and checked deadline outputs; Explain exceptions using case history and supplied escalation criteria; Prepare escalation notes and customer-update drafts; Test missing timestamps, paused cases and disputed ownership.	**Project:** A service escalation assistant that explains queue exceptions and drafts review notes. **Assessment:** Verify that escalation recommendations match the rules and do not invent deadline calculations.
Build a Customer Renewal Assistant **CRM-A04** Process course 04	Provide renewal terms and structured account-history fields; Generate account briefs and context-sensitive follow-up drafts; Flag unresolved service issues and unavailable commercial information; Test changed terms and incomplete renewal records.	**Project:** A renewal assistant with account-brief templates and a documented test set. **Assessment:** Verify the assistant preserves supplied terms and flags unresolved information before proposing follow-up.
Build a Feedback Analysis Assistant **CRM-A05** Process course 05	Define theme labels with inclusion and exclusion examples; Require evidence-linked summaries and explicit uncertain assignments; Separate customer comments from proposed interpretations; Test mixed feedback, duplicates and unfamiliar topics.	**Project:** A feedback analysis assistant with a theme guide and a comparison against human-labelled samples. **Assessment:** Review classification disagreements and correct unsupported themes or summaries.

Return to course directory

02 / CUSTOMER RELATIONSHIPS

AI Workflow Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Build a Customer Request Review Workflow **CRM-W00** Generic domain course	Map a simple customer request from intake to response review; Check required information and select relevant service references; Connect AI drafting with a human approval step; Record response status, corrections and handover notes.	**Project:** A customer-request workflow prototype with reviewed response drafts and a status register. **Assessment:** Demonstrate a complete request and an incomplete request without bypassing review.
Build a Complaint Ticket Tracking Workflow **CRM-W01** Process course 01	Map complaint intake, suggested routing and ownership; Track status changes and required case information; Add overdue flags and escalation review points; Define closure evidence and a human closure check.	**Project:** A tested complaint-ticket workflow prototype with a case register, exception log and operating guide. **Assessment:** Demonstrate incomplete, escalated and resolved cases; verify closure requires the stated evidence.
Build a Customer Knowledge Response Workflow **CRM-W02** Process course 02	Map query intake, knowledge selection and answer preparation; Check reference versions and answer-source links; Route unresolved or conflicting questions to a named reviewer; Record approved answers and suggested knowledge corrections.	**Project:** A knowledge-response workflow prototype with source checks, review routing and a knowledge-update queue. **Assessment:** Test an outdated source and an unanswered question; confirm neither produces an unreviewed definitive answer.
Build a Service Escalation Monitoring Workflow **CRM-W03** Process course 03	Map a sample service queue and commitment checkpoints; Apply spreadsheet deadline rules and exception flags; Prepare owner reminders and escalation drafts for review; Track acknowledgement, revised status and unresolved exceptions.	**Project:** A service-monitoring prototype with checked deadlines, reviewable reminders and an escalation register. **Assessment:** Test paused, overdue and resolved cases; confirm repeated runs do not duplicate escalation records.
Build a Customer Renewal Follow-up Workflow **CRM-W04** Process course 04	Map renewal dates, account ownership and information requirements; Prepare account briefs and follow-up drafts from approved inputs; Route unresolved issues or changed terms for review; Track planned contact, responses and next actions.	**Project:** A renewal follow-up prototype with account briefs, reviewed draft messages and a status tracker. **Assessment:** Test an approaching renewal and an unresolved service issue; verify appropriate review routing.
Build a Customer Feedback Review Workflow **CRM-W05** Process course 05	Map feedback intake, anonymisation and duplicate checks; Connect theme coding with human review of uncertain items; Calculate checked theme counts and prepare an evidence-linked summary; Track improvement actions, owners and review status.	**Project:** A feedback-review workflow prototype linking cleaned comments, reviewed themes and an improvement-action register. **Assessment:** Test duplicate and mixed-theme feedback; reconcile summary counts and preserve supporting evidence.

Return to course directory

03 / BUSINESS REPORTING & OPERATIONS

AI Productivity

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Everyday Operations Briefing with AI **OPS-P00** Generic domain course	Identify the information needed for one daily operations brief; Structure a sample activity log into clear facts and open issues; Prompt for a concise summary with references to source records; Check factual accuracy, missing details and unsupported conclusions.	**Project:** A checked daily operations brief from one sample activity log, with a source checklist. **Assessment:** Trace each material statement to the activity log and flag missing information without inventing an explanation.
Weekly KPI Reporting with AI **OPS-P01** Process course 01	Define each metric, reporting period and comparison baseline; Check spreadsheet totals, units and period consistency before analysis; Draft commentary that separates observed changes from possible explanations; Identify missing records and explain limitations in the report.	**Project:** A weekly KPI report with verified comparisons, supporting source references and a missing-data note. **Assessment:** Reconcile reported figures to the supplied calculation sheet and distinguish supported findings from unverified explanations.
Backlog and Exception Analysis with AI **OPS-P02** Process course 02	Read work statuses, outstanding dates and operational exception categories; Check backlog ageing using a stated review date and spreadsheet calculations; Apply supplied priority rules to delayed or incomplete work; Prepare action recommendations with ownership gaps and supporting reasons.	**Project:** A checked backlog report and prioritised exception list for a sample operations queue. **Assessment:** Verify ageing and priority rules on selected records, including incomplete and contradictory status entries.
Workload and Handover Planning with AI **OPS-P03** Process course 03	Read task effort, capacity, due dates and dependency information; Prepare suggested allocations within supplied capacity constraints; Create handover notes covering status, blockers and next actions; Check overloads, unresolved dependencies and unconfirmed responsibilities.	**Project:** A proposed allocation sheet and handover brief for one sample team shift. **Assessment:** Keep proposed allocations within stated capacity and flag every supplied dependency or ownership conflict.
SOP Review and Process Guidance **OPS-P04** Process course 04	Identify the applicable operating document and its version; Extract steps, responsibilities and required evidence from source passages; Draft process guidance with references and stated assumptions; Flag conflicting instructions and questions the sources cannot answer.	**Project:** A referenced process guide and question log built from a small sample SOP set. **Assessment:** Support each process step with the correct source version and escalate an unresolved instruction conflict.
Meeting Decisions and Action Tracking **OPS-P05** Process course 05	Distinguish decisions, proposed actions and unresolved questions in meeting notes; Extract owners and deadlines only where the notes confirm them; Prepare an action register with source references and clear statuses; Check omissions, duplicated actions and ambiguous commitments.	**Project:** Checked meeting minutes and an action register from one sample meeting record. **Assessment:** Match decisions to the source and mark unconfirmed owners or dates instead of filling them in.

Return to course directory

03 / BUSINESS REPORTING & OPERATIONS

AI Assistant Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Reusable Operations Briefing Assistant **OPS-A00** Generic domain course	Define the purpose and boundaries of a daily briefing assistant; Create an input template and a consistent briefing format; Write instructions for source references and missing-information responses; Test the assistant on normal, incomplete and inconsistent activity logs.	**Project:** A reusable daily briefing assistant with an input template and recorded test results. **Assessment:** Produce a consistent brief on an unseen log and correctly flag incomplete or conflicting inputs.
Weekly KPI Reporting Assistant **OPS-A01** Process course 01	Supply a metric dictionary, reporting rules and checked calculation inputs; Define consistent comparison and commentary instructions; Require the assistant to flag missing periods or unmapped metrics; Test factual consistency across multiple prepared reporting examples.	**Project:** A weekly reporting assistant with a metric dictionary, reusable instructions and a test log. **Assessment:** Use the supplied metric definitions consistently and flag missing periods without generating substitute figures.
Backlog Review and Exception Assistant **OPS-A02** Process course 02	Define status categories, priority rules and escalation boundaries; Structure checked queue data for repeatable assistant review; Generate exception explanations and suggested actions with record references; Test contradictory statuses, missing dates and priority conflicts.	**Project:** A backlog review assistant that produces a referenced exception brief from prepared queue records. **Assessment:** Apply the stated rules consistently and explain uncertainty when a record cannot be classified reliably.
Work Allocation and Handover Assistant **OPS-A03** Process course 03	Configure task, capacity and handover input requirements; Write instructions for suggested allocations and dependency checks; Require clarification when responsibility or availability is missing; Test overloaded schedules and conflicting handover information.	**Project:** An allocation and handover assistant with a constraint checklist and tested example cases. **Assessment:** Identify an overloaded plan and missing owner, while preserving supervisor approval of the proposed allocation.
SOP Guidance Assistant **OPS-A04** Process course 04	Organise a small approved SOP collection by topic and version; Define answer instructions requiring source passages and clear boundaries; Set responses for unanswered questions and conflicting document versions; Test routine questions, out-of-scope requests and outdated instructions.	**Project:** A source-based SOP assistant with an answer format, escalation rules and evaluation records. **Assessment:** Cite the applicable source version and withhold unsupported instructions on an unanswerable test question.
Meeting Action Review Assistant **OPS-A05** Process course 05	Define consistent formats for minutes, decisions and action records; Configure rules for confirmed owners, dates and decision context; Flag ambiguous commitments and possible duplicate actions; Test the assistant against prepared notes and a reference answer set.	**Project:** A meeting review assistant with an action template, clarification prompts and a test log. **Assessment:** Recover the reference decisions and actions while preserving uncertainty about missing owners or deadlines.

Return to course directory

03 / BUSINESS REPORTING & OPERATIONS

AI Workflow Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Daily Operations Briefing Workflow **OPS-W00** Generic domain course	Map activity-log intake, validation, briefing and human approval; Connect prepared templates and an AI step in a small prototype; Route incomplete inputs back for correction before review; Record the reviewed output and test a complete reporting cycle.	**Project:** A tested daily briefing prototype with an input check, AI summary and human approval record. **Assessment:** Run normal and incomplete logs through the prototype and retain the correct review or correction outcome.
Weekly KPI Reporting Workflow **OPS-W01** Process course 01	Map source intake, spreadsheet checks, commentary and analyst approval; Connect a prepared data template with validated calculations and AI drafting; Route missing periods or unexplained changes to the reviewer; Keep a versioned report record and test reporting exceptions.	**Project:** A weekly reporting prototype with validated inputs, draft commentary, review checkpoints and test records. **Assessment:** Complete one reporting cycle and route a missing-period case to review without releasing an unchecked report.
Backlog Review and Escalation Workflow **OPS-W02** Process course 02	Map queue updates, rule checks, exception flags and owner review; Connect prepared queue records with a draft exception brief; Track escalation decisions and action status in a sample register; Test a missing-date case and a conflicting status update.	**Project:** A backlog-monitoring prototype with an exception register, review decisions and escalation history. **Assessment:** Trace a delayed item from input to reviewed action and handle a conflicting status without overwriting evidence.
Work Allocation and Handover Workflow **OPS-W03** Process course 03	Map task intake, capacity checks, proposed allocation and supervisor review; Connect prepared task and availability templates to an AI drafting step; Record approved assignments and create a structured handover draft; Test capacity shortages and unresolved dependencies before approval.	**Project:** A task-allocation and handover prototype with capacity checks, approval records and an exception log. **Assessment:** Route an overload for supervisor review and preserve the approved assignment in the handover record.
SOP Query and Review Workflow **OPS-W04** Process course 04	Map question intake, source selection, answer drafting and review; Connect a prepared SOP index with a source-based AI response; Route missing or conflicting guidance to a named review role; Log the source version, answer status and escalation outcome.	**Project:** An SOP query-handling prototype with source tracking, review states and unresolved-question routing. **Assessment:** Demonstrate a supported answer and a conflicting-source escalation with the correct version recorded in both cases.
Meeting Follow-up Tracking Workflow **OPS-W05** Process course 05	Map meeting-note intake, action extraction and owner confirmation; Connect an AI draft to a prepared action tracker; Check due dates and prepare reminders for human review; Test duplicated actions, completed items and changed commitments.	**Project:** A meeting follow-up prototype with confirmed actions, status tracking and reviewed reminder drafts. **Assessment:** Track a confirmed action through a status change and suppress a reminder for a completed item.

Return to course directory

04 / FINANCE & ACCOUNTING

AI Productivity

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Everyday AI for Finance Work **FIN-P00** Generic domain course	Give AI the reporting purpose and financial context; Summarise supplied finance notes with source references; Check quoted figures against a supplied worksheet; Prepare a concise finance handover for review.	**Project:** A checked finance handover brief based on a supplied worksheet and meeting notes. **Assessment:** Trace every financial figure and material statement to the supplied evidence.
Receivables Ageing and Follow-up Preparation **FIN-P01** Process course 01	Check customer, invoice and due-date fields; Verify ageing and balances using a prepared spreadsheet; Separate overdue, disputed and recently paid items; Draft account-specific follow-up for review.	**Project:** A checked ageing summary, follow-up priority list and three account-specific reminder drafts. **Assessment:** Reconcile balances and explain the treatment of a disputed invoice and a recent payment.
Invoice Checks and Payables Exception Reporting **FIN-P02** Process course 02	Identify required invoice fields and supporting documents; Compare sample invoice, order and receipt details; Check duplicates, quantities and supplied price calculations; Explain mismatches and evidence needed for review.	**Project:** An invoice verification worksheet and exception report for a small sample batch. **Assessment:** Find seeded duplicates and document mismatches without treating an unmatched invoice as approved.
Expense Claim Checks and Review Notes **FIN-P03** Process course 03	Organise claim records and receipt references; Check categories and limits against a supplied policy; Identify missing evidence and possible duplicate claims; Draft clear review questions for the claimant.	**Project:** A checked expense-claim register with exception notes and missing-information requests. **Assessment:** Support each policy exception with the relevant rule and evidence from the claim.
Budget Variance Analysis and Commentary **FIN-P04** Process course 04	Align reporting periods and account categories; Verify variances and percentages using spreadsheet formulas; Apply supplied materiality rules; Separate evidenced explanations from questions requiring investigation.	**Project:** A verified budget-variance report with management commentary and an open-questions list. **Assessment:** Reconcile totals and avoid inventing causes where the source material provides no explanation.
Bank Reconciliation Review and Exception Analysis **FIN-P05** Process course 05	Standardise sample bank and cashbook fields; Compare dates, references and amounts using stated rules; Distinguish timing differences, fees and unmatched entries; Prepare evidence for a reconciliation reviewer.	**Project:** A reconciliation worksheet showing proposed matches, unresolved differences and supporting references. **Assessment:** Verify the reconciliation totals and flag ambiguous matches instead of forcing them.

Return to course directory

04 / FINANCE & ACCOUNTING

AI Assistant Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Finance Briefing Assistant **FIN-A00** Generic domain course	Define the briefing audience and output format; Organise supplied finance notes and reference instructions; Require sources and missing-information responses; Test the assistant on an unfamiliar briefing case.	**Project:** A reusable finance-briefing assistant with instructions, sample inputs and a test record. **Assessment:** Produce a consistent brief and identify an unsupported figure in a new test case.
Receivables Follow-up Assistant **FIN-A01** Process course 01	Define follow-up rules and required account context; Use verified balances and payment-status references; Generate reviewed reminders and dispute handover notes; Test missing contacts, disputed invoices and payment updates.	**Project:** A receivables assistant that prepares reminder drafts and exception notes from verified account records. **Assessment:** Suppress an overdue reminder for a recorded payment and route a dispute for review.
Invoice Verification Assistant **FIN-A02** Process course 02	Encode document checks and evidence requirements; Compare structured invoice and purchase records; Explain mismatches with document references; Test incomplete, duplicate and conflicting documents.	**Project:** An invoice-checking assistant with an exception format and a labelled test set. **Assessment:** Identify the seeded exceptions and request missing evidence before giving a complete review summary.
Expense Policy Review Assistant **FIN-A03** Process course 03	Structure policy references and rule precedence; Extract claim facts without filling missing evidence; Draft policy-based review notes and questions; Test ambiguous claims and conflicting policy versions.	**Project:** An expense-review assistant with policy references, response templates and documented test cases. **Assessment:** Cite the current rule and escalate an unclear claim instead of making a reimbursement decision.
Budget Commentary Assistant **FIN-A04** Process course 04	Define commentary structure and materiality thresholds; Provide verified variance calculations and business notes; Require evidence for explanations and explicit unknowns; Test new periods and conflicting commentary inputs.	**Project:** A reusable commentary assistant that turns a verified variance table into a reviewable management brief. **Assessment:** Keep calculations unchanged and distinguish a supported cause from an unexplained movement.
Reconciliation Exception Assistant **FIN-A05** Process course 05	Define matching rules and acceptable date windows; Use a worksheet to establish candidate matches; Explain unmatched records and evidence requirements; Test duplicate amounts and conflicting references.	**Project:** A reconciliation assistant that explains candidate matches and prepares a reviewer queue for unresolved items. **Assessment:** Keep ambiguous candidates unresolved and support each suggested match with the relevant record fields.

Return to course directory

04 / FINANCE & ACCOUNTING

AI Workflow Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Finance Briefing Review Workflow **FIN-W00** Generic domain course	Map input collection, drafting and review steps; Check input versions and required information; Route a draft through a human review checkpoint; Record corrections and final handover status.	**Project:** A small finance-briefing workflow prototype with a review queue and correction log. **Assessment:** Trace one complete case and stop an incomplete case before final handover.
Receivables Reminder and Dispute Workflow **FIN-W01** Process course 01	Map due-date checks and account-status updates; Prepare reminder drafts from verified records; Route disputed or incomplete items to a reviewer; Track approval, follow-up ownership and duplicate prevention.	**Project:** A receivables follow-up prototype with reminder drafts, dispute routing and an action register. **Assessment:** Demonstrate overdue, paid and disputed cases while preventing duplicate reminder preparation.
Invoice Intake and Exception Review Workflow **FIN-W02** Process course 02	Define invoice intake fields and document checks; Connect rule-based validation with AI review summaries; Route missing evidence and discrepancies for review; Track processing status and repeat submissions.	**Project:** An invoice-intake prototype that produces a review queue, exception summaries and a status log. **Assessment:** Process valid, incomplete and duplicate submissions with traceable status and reviewer ownership.
Expense Claim Evidence and Review Workflow **FIN-W03** Process course 03	Map claim intake and evidence requirements; Combine spreadsheet checks with policy-based draft notes; Prepare missing-document requests for review; Track reviewer decisions and resubmitted evidence.	**Project:** An expense-review prototype with an evidence checklist, exception queue and review history. **Assessment:** Handle an incomplete claim and its resubmission without bypassing the human reimbursement decision.
Budget Reporting and Commentary Review Workflow **FIN-W04** Process course 04	Check reporting period and source-file versions; Validate prepared spreadsheet calculations; Generate draft commentary from referenced evidence; Route unresolved movements and record review changes.	**Project:** A budget-reporting prototype linking verified comparisons, commentary drafts and reviewer sign-off status. **Assessment:** Reject a mismatched reporting period and retain the reviewer correction in the final report history.
Reconciliation Matching and Exception Review Workflow **FIN-W05** Process course 05	Validate sample bank and cashbook inputs; Generate candidate matches using a prepared worksheet; Route ambiguous and unmatched items with explanations; Record review outcomes and closing reconciliation totals.	**Project:** A reconciliation review prototype with candidate matches, an exception queue and a reviewer audit trail. **Assessment:** Reconcile the sample totals and preserve unresolved differences after review without posting accounting entries.

Return to course directory

05 / HR & RECRUITMENT ADMINISTRATION

AI Productivity

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
Everyday AI for HR Administration **HRA-P00** Generic domain course	Give AI a clear HR communication purpose; Summarise approved administrative notes; Check names, dates and instructions against source records; Prepare a concise HR coordination handover.	**Project:** A checked HR handover brief and staff communication draft based on sample administrative notes. **Assessment:** Trace every action, date and named responsibility to the supplied source material.
Recruitment Tracking and Candidate Communication **HRA-P01** Process course 01	Organise vacancy and candidate status fields; Identify missing coordination information and overdue actions; Compare sample interviewer availability; Draft factual invitations and status updates for review.	**Project:** A recruitment coordination tracker, interview schedule proposal and candidate communication drafts. **Assessment:** Identify a scheduling conflict and produce accurate messages without evaluating candidate suitability.
Onboarding Packs and Document Checklists **HRA-P02** Process course 02	Map role-specific onboarding requirements; Prepare checklists from supplied policy references; Identify missing documents and task owners; Draft welcome instructions with verified dates and contacts.	**Project:** A role-specific onboarding pack with a document checklist and responsibility tracker. **Assessment:** Find missing onboarding evidence and correctly assign the supplied task owners and due dates.
Policy Research and Employee Response Drafting **HRA-P03** Process course 03	Identify the current supplied policy version; Find passages relevant to a routine question; Write a clear answer with source references; Recognise missing guidance and escalation needs.	**Project:** A reviewed answer set for routine employee questions with policy references and an escalation list. **Assessment:** Cite the correct policy version and leave an unsupported question for human clarification.
Leave and Attendance Exception Reporting **HRA-P04** Process course 04	Align sample attendance and leave records by date; Check balances using supplied spreadsheet calculations; Distinguish approved, pending and missing records; Draft neutral discrepancy questions for HR review.	**Project:** A checked attendance and leave exception report with supporting records and clarification requests. **Assessment:** Reconcile the sample dates and balances without treating missing records as evidence of misconduct.
Training Needs and Completion Coordination **HRA-P05** Process course 05	Map supplied role requirements to training records; Identify missing, due and completed training; Check session capacity and schedule information; Prepare invitations and a completion follow-up list.	**Project:** A training coordination plan with required sessions, communication drafts and a completion register. **Assessment:** Match each required session to the supplied role matrix and identify missing completion evidence.

Return to course directory

05 / HR & RECRUITMENT ADMINISTRATION

AI Assistant Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
HR Administration Briefing Assistant **HRA-A00** Generic domain course	Define the briefing inputs and audience; Use approved administrative reference notes; Apply consistent action and responsibility formats; Test missing dates and conflicting instructions.	**Project:** An HR briefing assistant with reusable instructions, source references and documented tests. **Assessment:** Generate a consistent handover and request clarification when the supplied instructions conflict.
Recruitment Coordination Assistant **HRA-A01** Process course 01	Define required vacancy and scheduling context; Use approved communication templates and status rules; Draft interview arrangements and factual status messages; Test conflicts, missing details and out-of-scope requests.	**Project:** A recruitment coordination assistant that prepares scheduling notes and reviewed communication drafts. **Assessment:** Resolve a coordination case while escalating a request to rank or select candidates.
Employee Onboarding Assistant **HRA-A02** Process course 02	Structure role and location requirements; Use approved onboarding sources and task templates; Prepare tailored checklists and welcome instructions; Test missing information and conflicting start dates.	**Project:** An onboarding assistant with role-specific checklists, welcome drafts and test cases. **Assessment:** Produce the correct role checklist and flag a missing requirement without inventing employee information.
HR Policy Question Assistant **HRA-A03** Process course 03	Organise policy sources and version precedence; Require supporting passages in draft answers; Define escalation and unanswered-question responses; Test conflicting policies and unsupported questions.	**Project:** A policy-question assistant with referenced answers, escalation rules and a labelled question test set. **Assessment:** Answer supported questions accurately and escalate a case where the supplied policy is silent.
Leave and Attendance Review Assistant **HRA-A04** Process course 04	Define administrative record checks and status rules; Use verified balances and attendance references; Explain discrepancies in neutral language; Test pending approvals and conflicting record dates.	**Project:** A record-review assistant that prepares evidence-based exception notes and clarification questions. **Assessment:** Distinguish pending approval from a confirmed discrepancy and preserve the supplied balance calculation.
Learning Coordination Assistant **HRA-A05** Process course 05	Structure role requirements and training records; Prepare required-session lists from the supplied matrix; Draft invitations and completion reminders; Test expired records, missing evidence and scheduling conflicts.	**Project:** A learning coordination assistant with session suggestions, communication drafts and completion checks. **Assessment:** Explain every required session using the role matrix and flag unsupported completion claims.

Return to course directory

05 / HR & RECRUITMENT ADMINISTRATION

AI Workflow Builder

Each course: 8 training hours | 1 project | 1 certificate after assessment

Course	What you learn	What you build and demonstrate
HR Communication Review and Handover Workflow **HRA-W00** Generic domain course	Map request intake, drafting and HR review; Check required context and source versions; Track comments and approved draft status; Record ownership and final handover.	**Project:** An HR communication workflow prototype with a request register, review queue and handover log. **Assessment:** Trace a completed request and keep an incomplete or unreviewed draft out of final handover.
Recruitment Scheduling and Status Workflow **HRA-W01** Process course 01	Map candidate status and interview coordination steps; Check sample availability and required details; Prepare scheduling drafts for coordinator approval; Track rescheduling, ownership and communication status.	**Project:** A recruitment coordination prototype with a scheduling queue, approved drafts and a status register. **Assessment:** Handle a rescheduled interview without losing the case history or making a candidate selection decision.
Onboarding Document and Task Tracking Workflow **HRA-W02** Process course 02	Map document collection and onboarding dependencies; Check required evidence and task ownership; Prepare reminders for outstanding items; Route exceptions and record onboarding review status.	**Project:** An onboarding tracking prototype with document checks, reminder drafts and a handover record. **Assessment:** Track a missing document through correction while preserving task ownership and review status.
HR Policy Query Review and Escalation Workflow **HRA-W03** Process course 03	Capture questions and necessary context; Retrieve current policy references and draft answers; Route unanswered or ambiguous questions for HR review; Maintain response history and source-version records.	**Project:** A policy-query prototype with referenced drafts, an escalation queue and a response history. **Assessment:** Demonstrate a supported answer and an unresolved question with traceable sources and reviewer routing.
Attendance Exception Review and Correction Workflow **HRA-W04** Process course 04	Check sample record completeness and date alignment; Use prepared calculations to identify discrepancies; Prepare clarification requests and a review queue; Track corrected evidence and closure approval.	**Project:** An attendance-review prototype with exception records, clarification drafts and correction history. **Assessment:** Correct a record mismatch with an audit trail while keeping leave approval with the reviewer.
Training Completion and Reminder Workflow **HRA-W05** Process course 05	Map training requirements and completion deadlines; Check attendance and completion evidence; Prepare overdue reminders for review; Track exceptions, updated evidence and reporting status.	**Project:** A training follow-up prototype with completion checks, reminder drafts and an exception register. **Assessment:** Update a completed record, flag missing evidence and prevent duplicate reminders for the same deadline.

Return to course directory