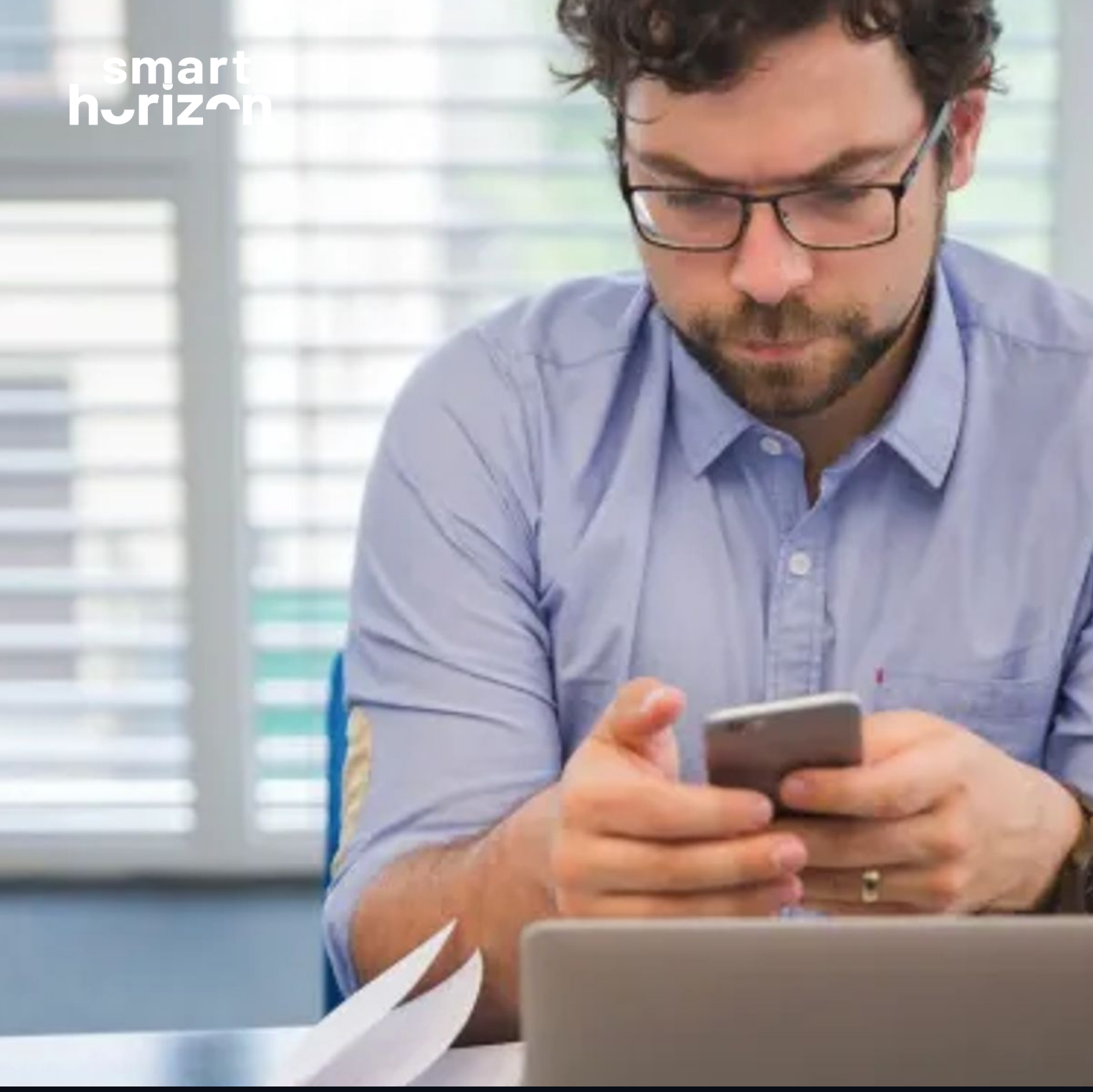


FINANCE & ACCOUNTING | COURSE BROCHURE

Building AI Financial Chatbot

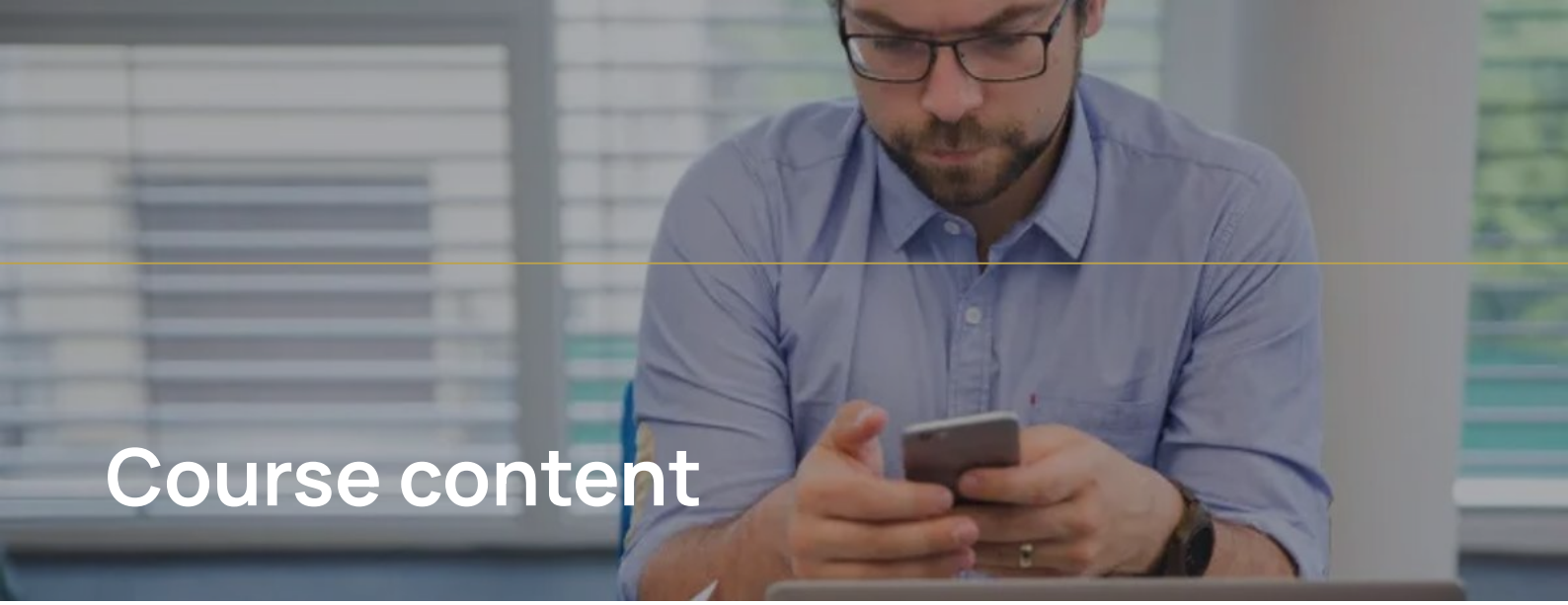
5 days | Classroom training | English

SMART HORIZON

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The Netherlands

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Course content

Why attend

This course focuses on developing AI-driven financial chatbots, equipping participants with the skills to design, implement, and optimise chatbots tailored for financial services. Participants will learn to enhance customer interaction, streamline services, and improve financial decision-making through AI technology.

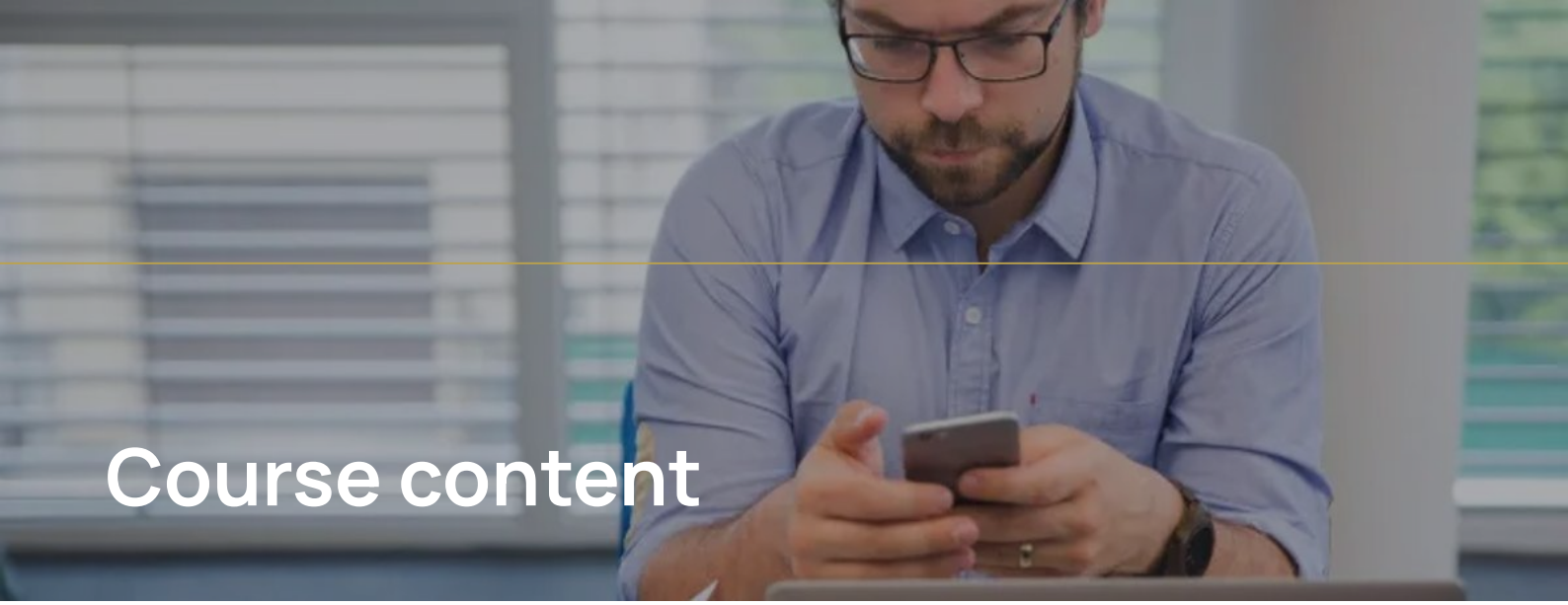
Financial institutions face increasing pressure to enhance customer service while managing operational costs effectively. AI chatbots can provide 24/7 assistance, answer complex queries, and facilitate transactions, addressing these challenges comprehensively. Understanding how to build and deploy these tools is crucial for staying competitive in the financial sector. Participants will learn to design chatbots that can handle intricate financial inquiries, ensuring compliance with regulations while improving customer satisfaction and retention. This capability is essential for financial professionals who must adapt to evolving customer expectations and technological advancements in a rapidly changing market.
Participants will engage in practical exercises that simulate real-world scenarios, such as designing conversation flows and integrating APIs. They will learn to evaluate chatbot performance and refine interactions based on user feedback, ensuring the chatbot meets customer needs and regulatory standards. By the end of the course, participants will have the skills to create a functional chatbot prototype, assess its effectiveness, and implement improvements based on analytics. This hands-on approach will empower them to make informed decisions about AI integration in their financial services, enhancing operational efficiency and customer engagement.

Professional Problems This Course Is Designed to Solve

- Difficulty translating subject knowledge into practical workplace decisions.
- Inconsistent approaches to the activities covered in the course outline.
- Lack of a structured plan for applying and reviewing new skills.

Course methodology

The course employs a blend of hands-on workshops, case studies, and collaborative projects to build practical skills. Participants will work on designing conversation flows, integrating machine learning models, and testing chatbot functionalities. Each session culminates in a project output, such as a prototype chatbot or a performance evaluation report, ensuring participants apply their learning effectively. Simulations will be used to mimic real-world interactions, enabling participants to experience the challenges of chatbot deployment. Feedback sessions will encourage peer learning and critical analysis, reinforcing the application of theoretical concepts in practical scenarios. Participants will also engage in group discussions to share insights and best practices, fostering a collaborative learning environment.



Course content

Course objectives

By the end of this course, participants will be able to:
• Design a conversational flow for a financial chatbot that meets user needs.
• Integrate machine learning algorithms to enhance chatbot responses and accuracy.
• Evaluate chatbot performance using user feedback and analytics tools.
• Implement security measures to protect user data in chatbot interactions.
• Construct a prototype financial chatbot using a chosen development platform.
• Justify the choice of AI technologies based on specific financial service requirements.

Target audience

This course is suitable for:
• Financial analysts looking to enhance customer engagement through technology.
• IT professionals in financial services seeking to implement AI solutions.
• Product managers responsible for developing digital financial products.
• Customer service managers aiming to improve service efficiency with AI tools.

Target competencies

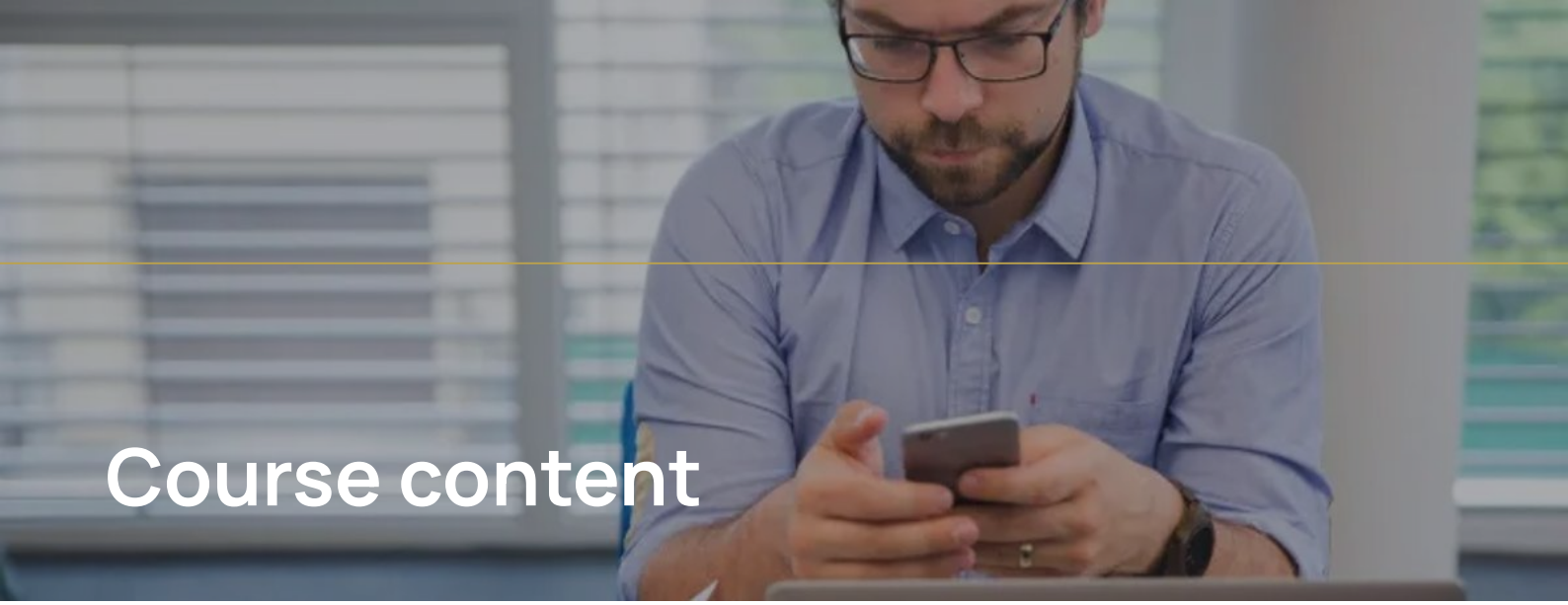
Participants will develop competencies in:
• Designing user-centric conversational interfaces for financial chatbots.
• Integrating AI technologies into existing financial service frameworks.
• Analysing user interactions to improve chatbot performance.
• Implementing data security measures in chatbot development.
• Prototyping AI solutions for real-world financial applications.
• Evaluating the effectiveness of AI tools in customer service contexts.

Course outline

Day 1: Introduction to AI Chatbots in Finance

Applied activity: Participants will analyse existing financial chatbots, identifying strengths and weaknesses in their design and functionality. They will present their findings to the group, focusing on user experience, compliance issues, and potential improvements.
Output: A report summarising the analysis of selected financial chatbots, including recommendations for enhancements.

09:00–09:54	Overview of AI chatbots and their role in financial services.
09:54–10:48	Understanding user needs and expectations in financial interactions.



Course content

10:48–11:00	Exploring various chatbot platforms and technologies available for finance.
11:00–11:30	**Coffee break**
11:30–12:12	Exploring various chatbot platforms and technologies available for finance. (continued)
12:12–13:06	Identifying regulatory considerations for financial chatbots and compliance requirements.
13:06–14:00	Case studies of successful financial chatbots and their impact on customer service.

Day 2: Designing Conversational Flows

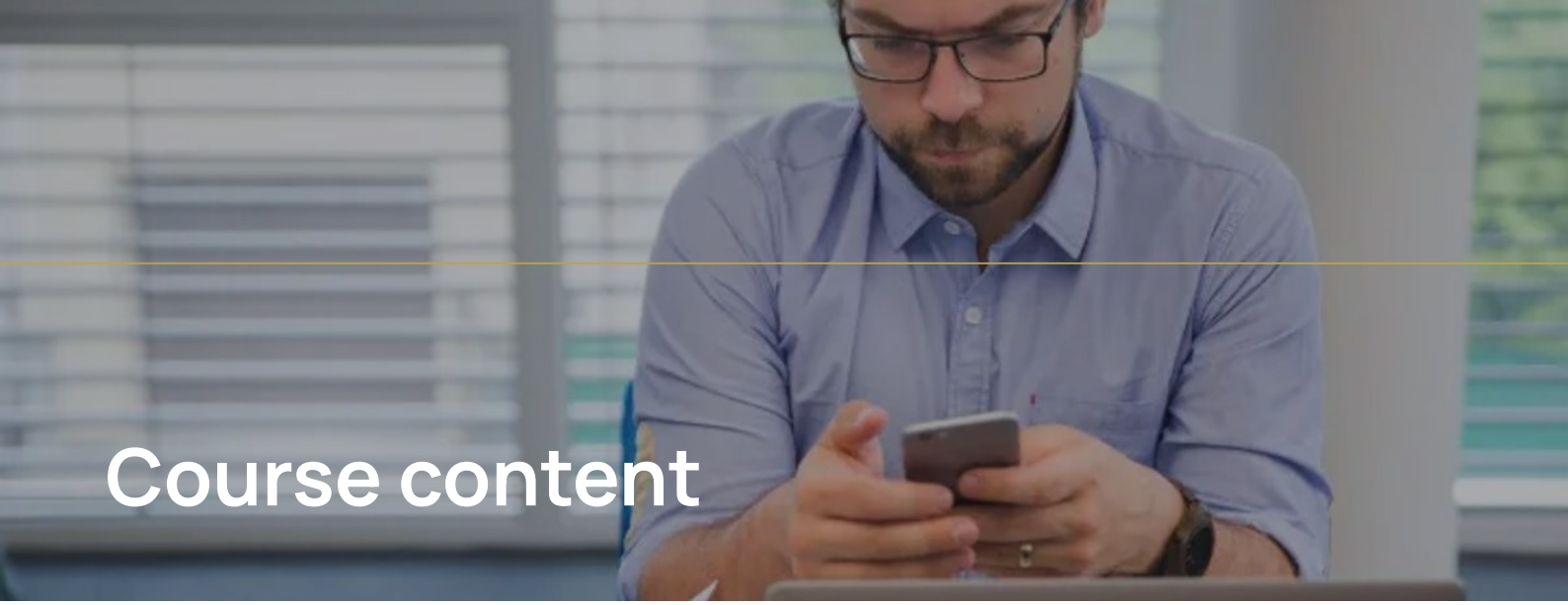
Applied activity: Participants will design a conversational flow for a specific financial service, incorporating user intents and responses. They will create a prototype using a design tool and conduct peer reviews to gather feedback on usability.
Output: A prototype conversational flow diagram for a financial chatbot, including user intents and responses.

09:00–09:54	Principles of conversational design specific to finance and user engagement.
09:54–10:48	Mapping user journeys and defining intents and entities for financial queries.
10:48–11:00	Creating dialogue scripts for common financial interactions and FAQs.
11:00–11:30	**Coffee break**
11:30–12:12	Creating dialogue scripts for common financial interactions and FAQs. (continued)
12:12–13:06	Utilising design tools for prototyping chatbot interactions and user testing.
13:06–14:00	Testing conversational flows with user scenarios to ensure clarity and effectiveness.

Day 3: Integrating AI and Machine Learning

Applied activity: Participants will select a machine learning algorithm and train it using sample financial data to improve response accuracy. They will assess the model's performance and make adjustments based on results and user feedback.
Output: A trained machine learning model ready for integration into a chatbot, along with performance metrics.

09:00–09:54	Introduction to machine learning concepts relevant to chatbots and financial data.
09:54–10:48	Selecting appropriate algorithms for financial queries and customer interactions.
10:48–11:00	Integrating natural language processing (NLP) capabilities to enhance user experience.
11:00–11:30	**Coffee break**
11:30–12:12	Integrating natural language processing (NLP) capabilities to enhance user experience. (continued)
12:12–13:06	Training and testing machine learning models with financial data for accuracy.



Course content

13:06–14:00	Evaluating the impact of AI on chatbot performance and user satisfaction.

Day 4: Security and Compliance in Chatbot Development

Applied activity: Participants will conduct a risk assessment for their chatbot design, identifying potential security vulnerabilities and compliance issues. They will propose solutions to mitigate these risks and ensure user data protection.
Output: A risk assessment report with recommendations for securing chatbot interactions and ensuring compliance.

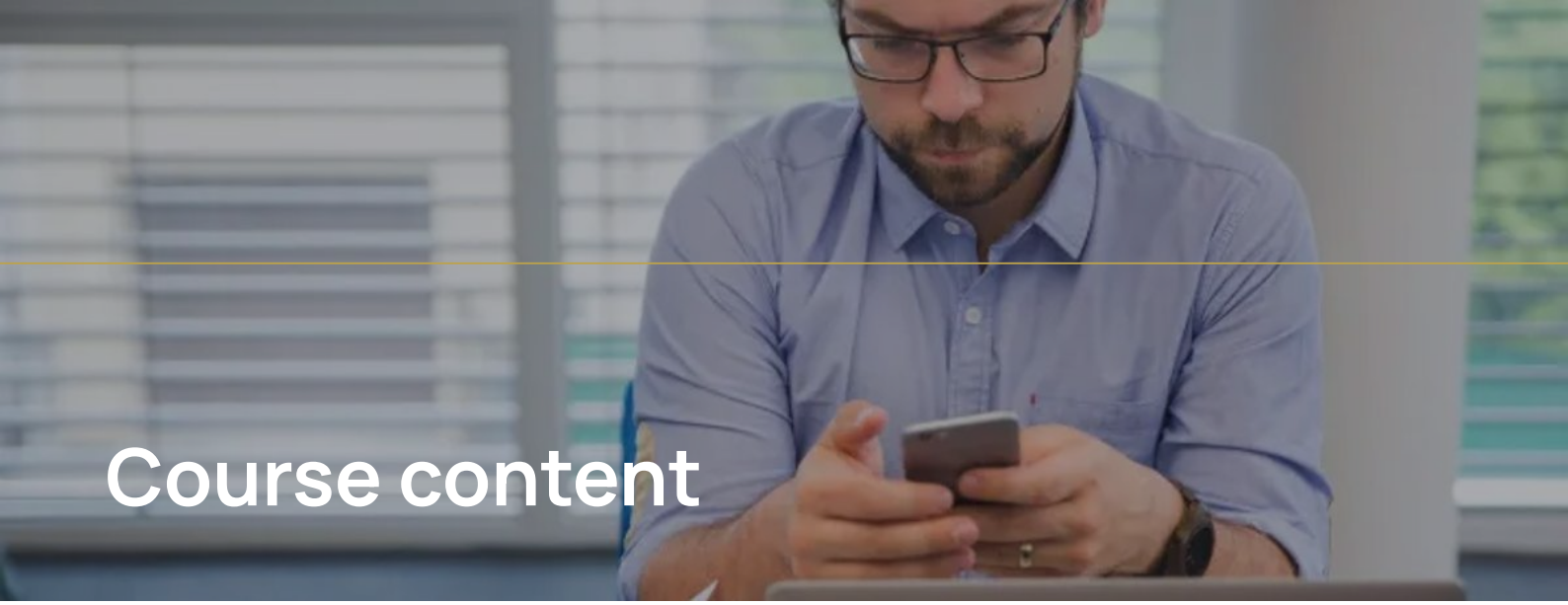
09:00–09:54	Understanding data privacy regulations affecting financial chatbots and user data.
09:54–10:48	Implementing security measures for user data protection and compliance.
10:48–11:00	Designing chatbots to comply with financial regulations and industry standards.
11:00–11:30	**Coffee break**
11:30–12:12	Designing chatbots to comply with financial regulations and industry standards. (continued)
12:12–13:06	Conducting risk assessments for chatbot interactions and identifying vulnerabilities.
13:06–14:00	Best practices for maintaining compliance in chatbot operations and updates.

Day 5: Final Project: Building and Evaluating a Financial Chatbot

Applied activity: Participants will build a complete financial chatbot that incorporates conversational flows, AI integration, and security measures. They will test it in a simulated environment, gather feedback, and refine the chatbot based on user interactions.
Output: A fully functional financial chatbot prototype with a presentation on its features, performance metrics, and user feedback.

09:00–09:54	Integrating all components into a functional chatbot prototype for financial services.
09:54–10:48	Testing the chatbot with real-world scenarios and user interactions.
10:48–11:00	Gathering user feedback and analytics for continuous improvement of the chatbot.
11:00–11:30	**Coffee break**
11:30–12:12	Gathering user feedback and analytics for continuous improvement of the chatbot. (continued)
12:12–13:06	Iterating on the chatbot design based on evaluation results and user insights.
13:06–14:00	Preparing a presentation of the final chatbot project, highlighting features and performance.

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.

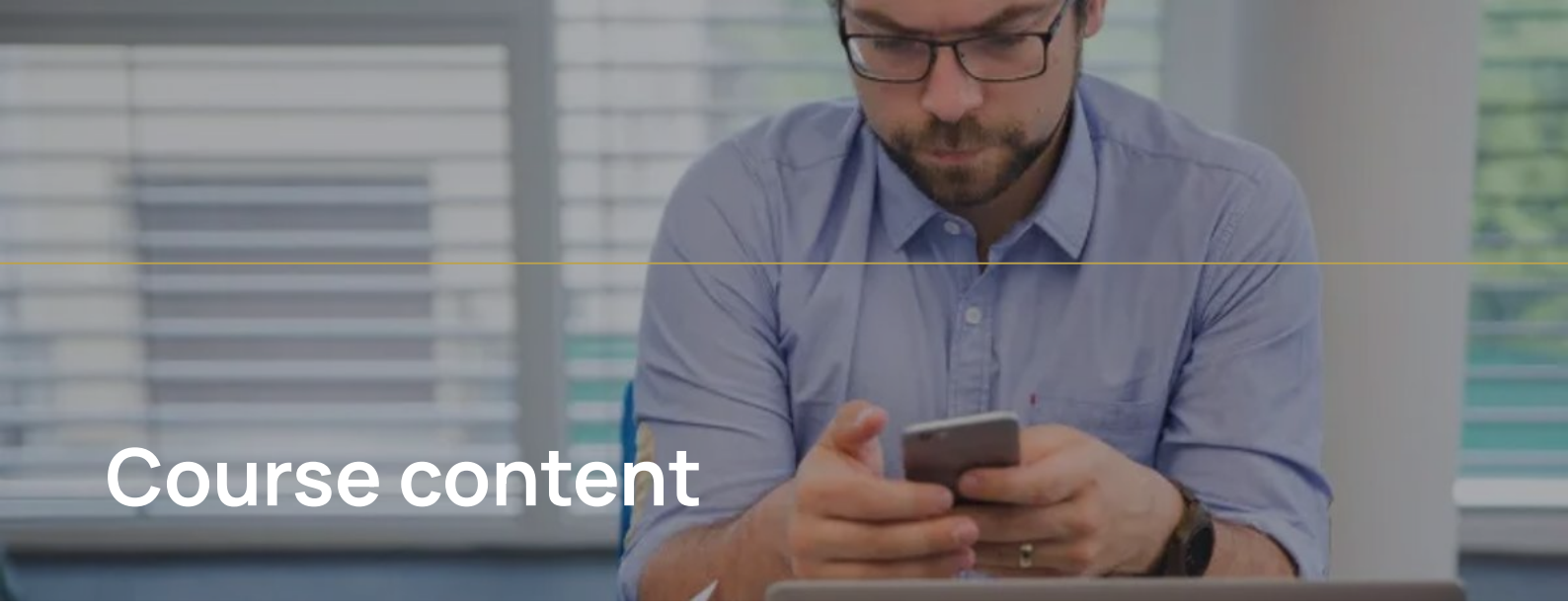


Course content

Dates, venues and fees

Current published course plans. Fees are per participant in EUR, excluding unconfirmed taxes.

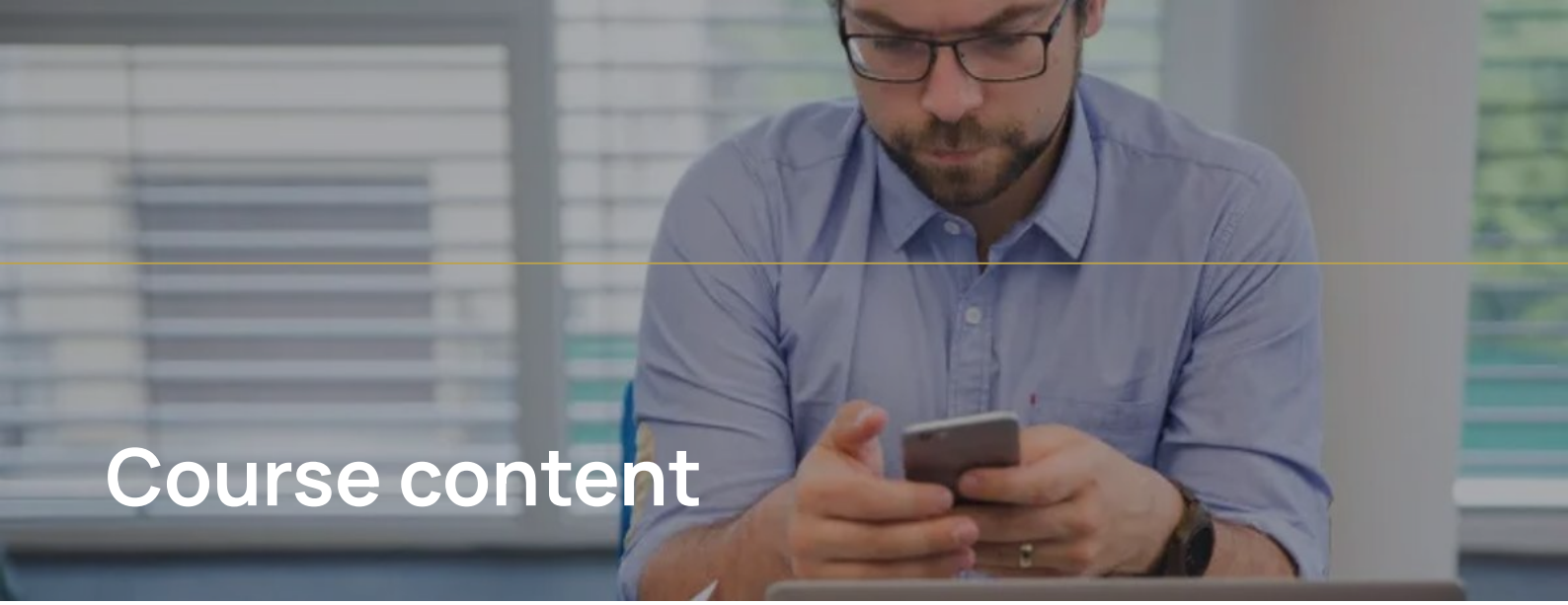
Venue	Start date	End date	Fee (EUR)
Kuala Lumpur Confirmed dates	9 Nov 2026	13 Nov 2026	**€1,450.-**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**€1,250.-**
Paris Confirmed dates	23 Nov 2026	27 Nov 2026	**€2,860.-**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**€1,250.-**
Istanbul Confirmed dates	7 Dec 2026	11 Dec 2026	**€2,650.-**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**€1,250.-**
Amsterdam Confirmed dates	14 Dec 2026	18 Dec 2026	**€2,540.-**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**€1,250.-**
Rome Confirmed dates	4 Jan 2027	8 Jan 2027	**€2,450.-**



Course content

Dates, venues and fees (continued)

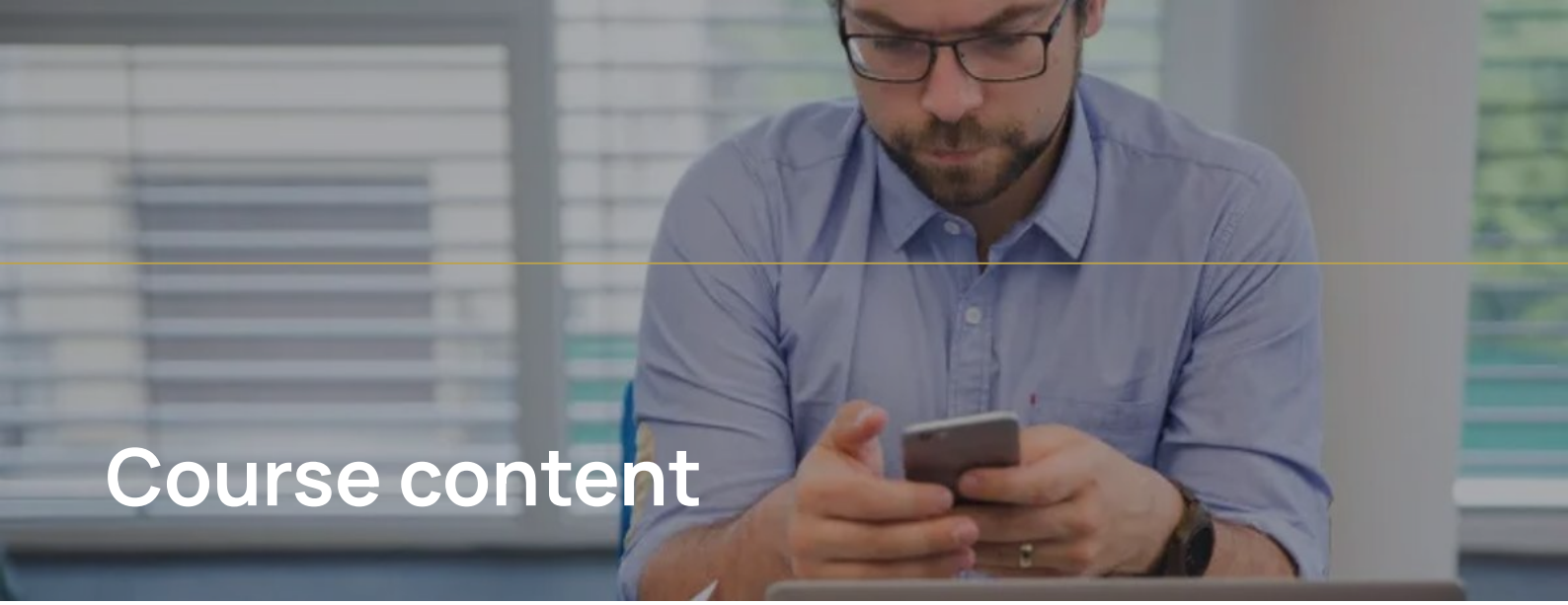
Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**€1,250.-**
Singapore Confirmed dates	11 Jan 2027	15 Jan 2027	**€2,820.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**€1,250.-**
London Confirmed dates	25 Jan 2027	29 Jan 2027	**€2,450.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**€1,250.-**
Dubai Confirmed dates	8 Feb 2027	12 Feb 2027	**€3,150.-**
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**€1,250.-**
Frankfurt Confirmed dates	22 Feb 2027	26 Feb 2027	**€2,650.-**
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**€1,250.-**



Course content

Dates, venues and fees (continued)

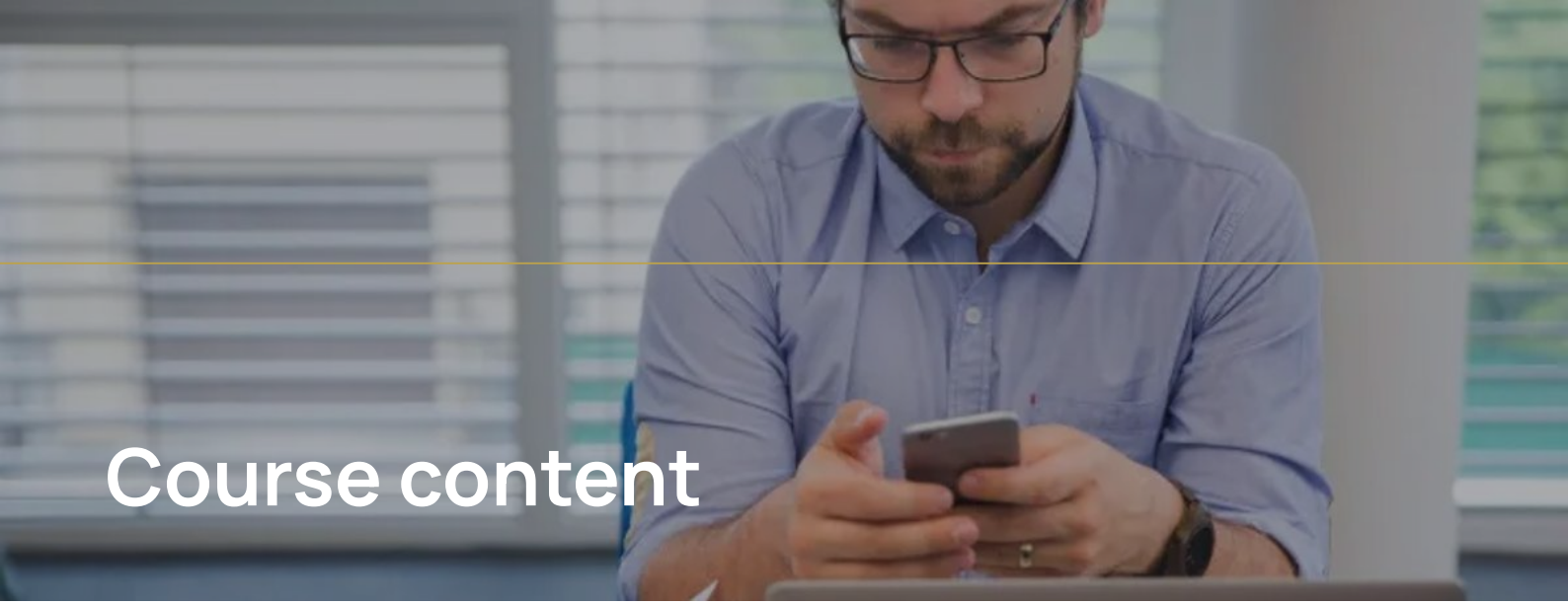
Venue	Start date	End date	Fee (EUR)
Kuala Lumpur Confirmed dates	8 Mar 2027	12 Mar 2027	**€1,450.-**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**€1,250.-**
Barcelona Confirmed dates	15 Mar 2027	19 Mar 2027	**€2,840.-**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**€1,250.-**
Paris Confirmed dates	22 Mar 2027	26 Mar 2027	**€2,860.-**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**€1,250.-**
Istanbul Confirmed dates	12 Apr 2027	16 Apr 2027	**€2,650.-**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**€1,250.-**
Amsterdam Confirmed dates	26 Apr 2027	30 Apr 2027	**€2,540.-**



Course content

Dates, venues and fees (continued)

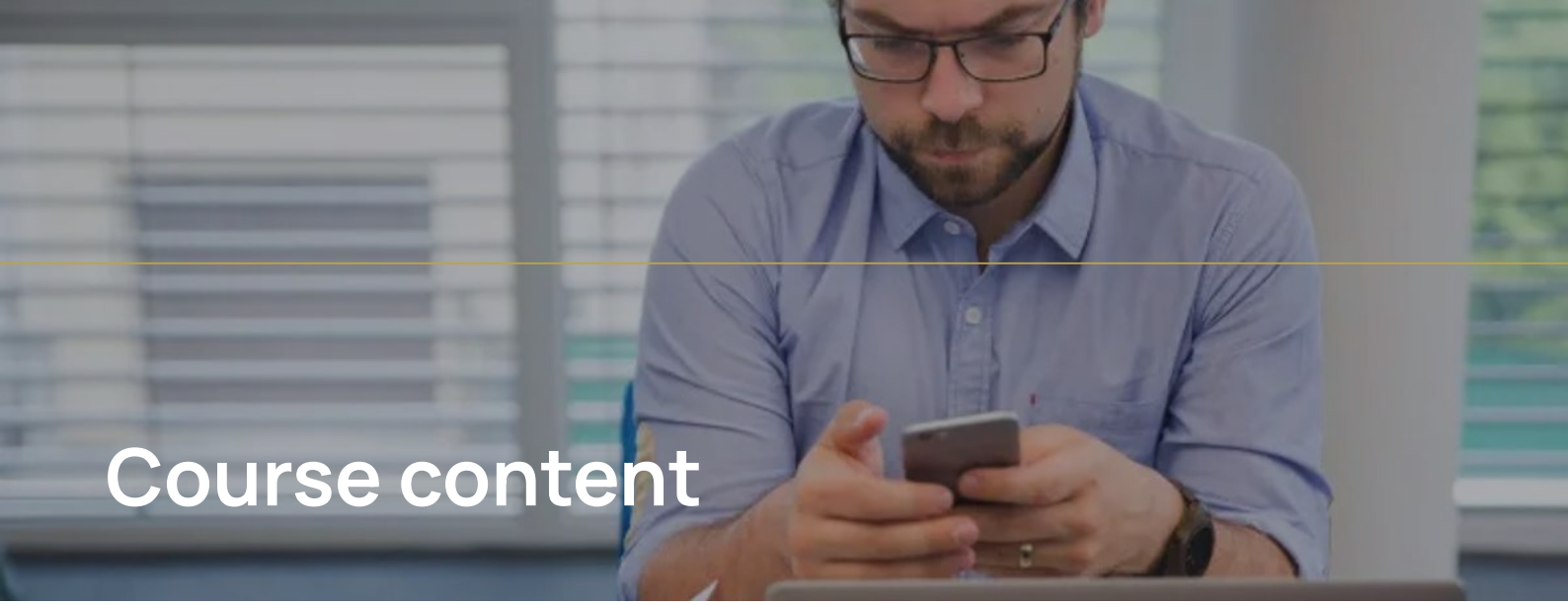
Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**€1,250.-**
Cape Town Confirmed dates	3 May 2027	7 May 2027	**€1,890.-**
Online Confirmed dates	3 May 2027	7 May 2027	**€1,250.-**
Singapore Confirmed dates	10 May 2027	14 May 2027	**€2,820.-**
Online Confirmed dates	10 May 2027	14 May 2027	**€1,250.-**
London Confirmed dates	24 May 2027	28 May 2027	**€2,450.-**
Online Confirmed dates	24 May 2027	28 May 2027	**€1,250.-**
Dubai Confirmed dates	14 Jun 2027	18 Jun 2027	**€3,150.-**
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**€1,250.-**



Course content

Dates, venues and fees (continued)

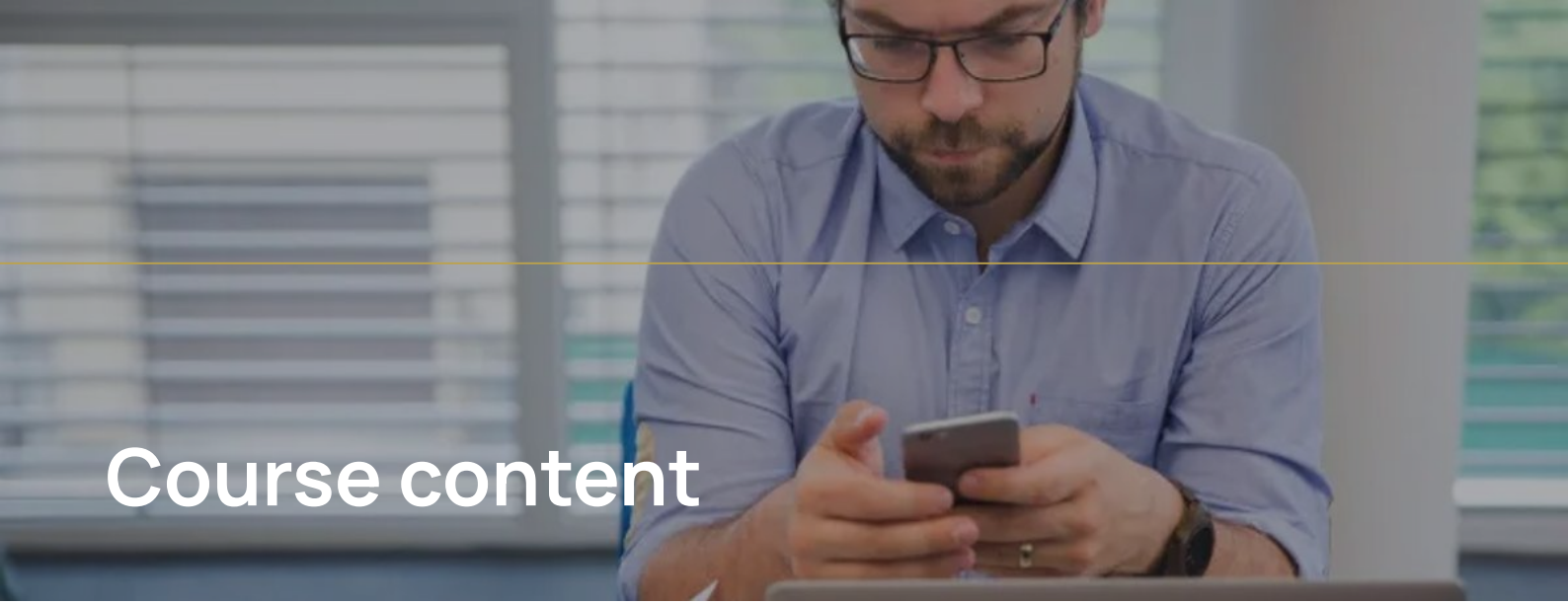
Venue	Start date	End date	Fee (EUR)
Frankfurt Confirmed dates	21 Jun 2027	25 Jun 2027	**€2,650.-**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**€1,250.-**
Rome Confirmed dates	5 Jul 2027	9 Jul 2027	**€2,450.-**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**€1,250.-**
Kuala Lumpur Confirmed dates	12 Jul 2027	16 Jul 2027	**€1,450.-**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**€1,250.-**
Paris Confirmed dates	26 Jul 2027	30 Jul 2027	**€2,860.-**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**€1,250.-**
Istanbul Confirmed dates	9 Aug 2027	13 Aug 2027	**€2,650.-**



Course content

Dates, venues and fees (continued)

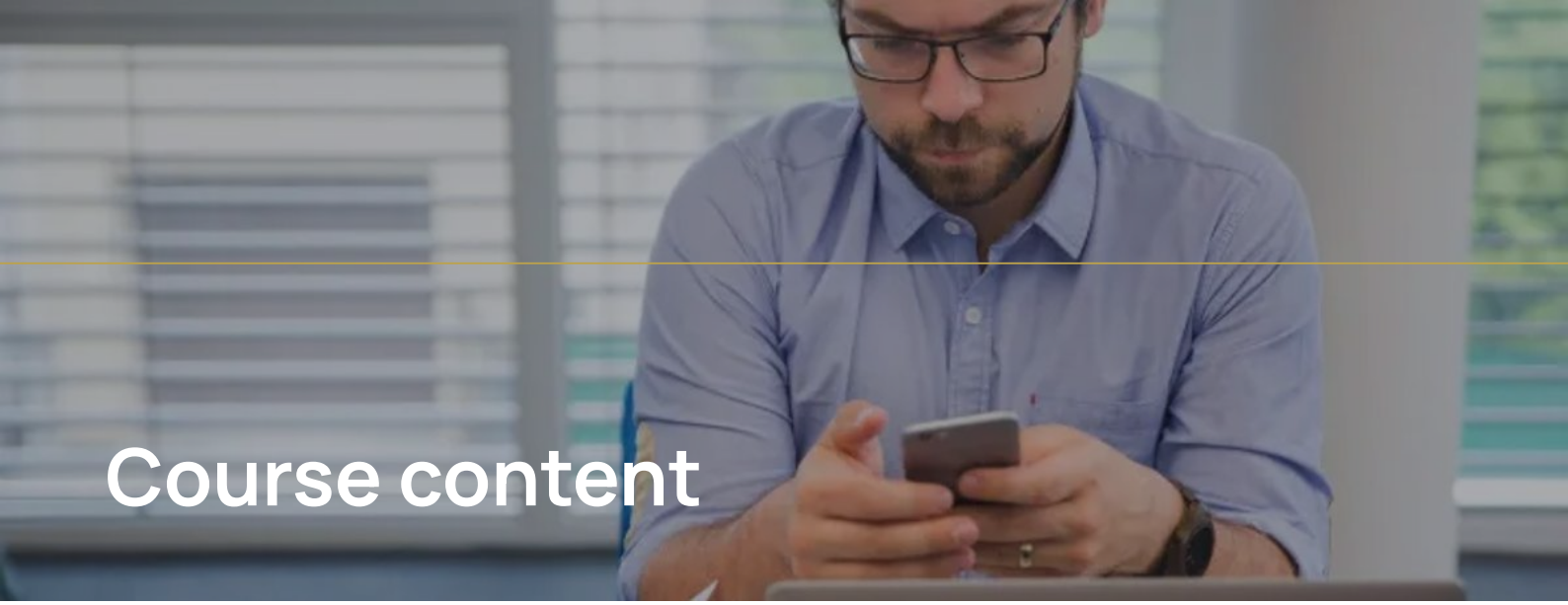
Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**€1,250.-**
Amsterdam Confirmed dates	23 Aug 2027	27 Aug 2027	**€2,540.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**€1,250.-**
Cape Town Confirmed dates	6 Sept 2027	10 Sept 2027	**€1,890.-**
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**€1,250.-**
Singapore Confirmed dates	13 Sept 2027	17 Sept 2027	**€2,820.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**€1,250.-**
London Confirmed dates	20 Sept 2027	24 Sept 2027	**€2,450.-**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**€1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Dubai Confirmed dates	11 Oct 2027	15 Oct 2027	**€3,150.–**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**€1,250.–**
Frankfurt Confirmed dates	25 Oct 2027	29 Oct 2027	**€2,650.–**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**€1,250.–**
Vienna Confirmed dates	1 Nov 2027	5 Nov 2027	**€2,940.–**
Online Confirmed dates	1 Nov 2027	5 Nov 2027	**€1,250.–**
Kuala Lumpur Confirmed dates	8 Nov 2027	12 Nov 2027	**€1,450.–**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**€1,250.–**
Paris Confirmed dates	22 Nov 2027	26 Nov 2027	**€2,860.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (EUR)
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**€1,250.-**
Istanbul Confirmed dates	6 Dec 2027	10 Dec 2027	**€2,650.-**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**€1,250.-**
Amsterdam Confirmed dates	13 Dec 2027	17 Dec 2027	**€2,540.-**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**€1,250.-**

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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