PROPOSAL FOR

Five-Level Applied AI Learning Pathway

Finance Track

From AI Literacy to Intelligent Finance Innovation

Proposed for

Higher Education Institutions Across Africa



75 Hours per Level
30 Hours Theory + 45 Hours Hands-on

Flexible Delivery
On-campus, blended or fully online

Real-World Projects
Hands-on use cases in every level

Industry-Oriented Certification Readiness
Portfolio and career readiness

Productivity AI Tools in Every Level
Stronger impact and faster learning

El Roi Nexus AI Platform
Platform access, content and guided learning

EXECUTIVE SUMMARY &

Program Objectives

Empowering Future-Ready Finance Graduates Through a Structured AI Learning Journey



Executive Summary

This five-level applied AI learning pathway equips finance students from commerce, accounting, finance, banking, insurance, fintech, economics and business disciplines with progressive AI skills, from AI literacy and productivity to data analysis, generative AI, intelligent automation and AI product innovation. Each level is 75 hours (30 hours theory + 45 hours hands-on), designed for higher education institutions across Africa and supported by El Roi Nexus AI with guided content to ensure a consistent, high-impact learning experience.

Target Audience

- **Commerce** — BCom and related programs
- **Accounting & Taxation** — BAcc, taxation and related programs
- **Finance** — BFinance and related programs
- **Banking & Insurance** — Banking, insurance and related programs
- **FinTech** — Fintech and digital finance programs
- **Economics** — BA Economics and related programs
- **Business Administration** — BBA and management programs
- **Related Business Programs** — Other business and finance related programs

Program Objectives

1. Build AI literacy and digital productivity for finance students.
2. Develop finance data analysis and decision-support capability.
3. Enable domain-specific AI applications for reports, research and financial workflows.
4. Prepare students for automation, AI agents and innovation in finance.
5. Strengthen portfolio, certification awareness and career readiness for the evolving finance workforce.

Key Highlights

- **5** Progressive Levels
- **375** Total Learning Hours
- **150** Hours Theory
- **225** Hours Hands-on
- **Productivity** AI Tools Embedded
- **Real-World** Finance Use Cases

Student Transformation Journey

LEVEL 1
AI-Aware Student
Understand AI basics and use AI tools confidently

LEVEL 2
AI-Enabled Analyst
Analyse finance data and generate insights

LEVEL 3
Finance Application Builder
Build finance applications for real-world problems

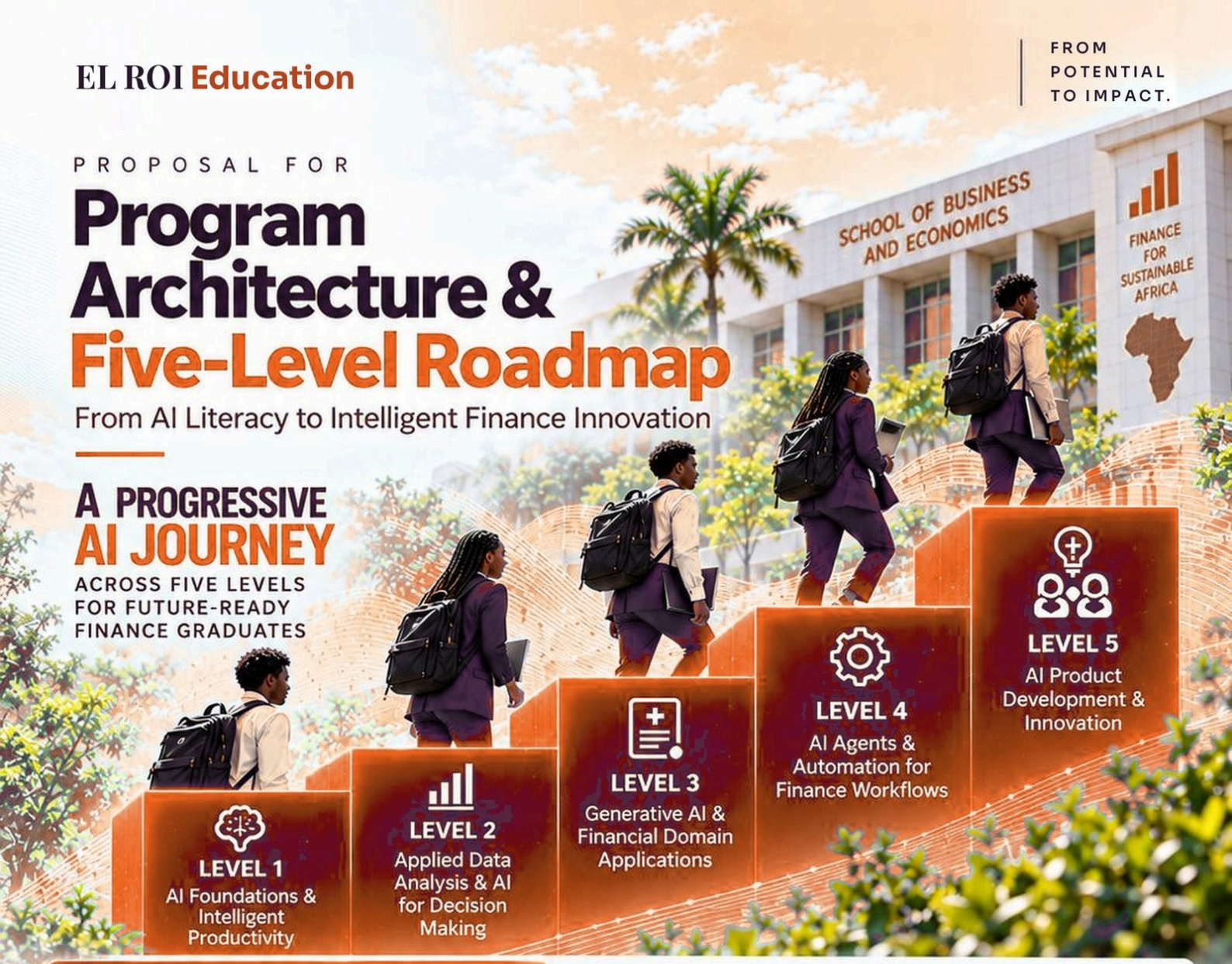
LEVEL 4
Intelligent Workflow Designer
Design automation workflows and AI agents for finance

LEVEL 5
Applied AI Innovator
Develop AI products and solutions with real-world impact

PROPOSAL FOR

Program Architecture & Five-Level Roadmap

From AI Literacy to Intelligent Finance Innovation



A PROGRESSIVE AI JOURNEY

ACROSS FIVE LEVELS FOR FUTURE-READY FINANCE GRADUATES

Academic Structure Per Level

30 Hours
Theory per Level
Concepts, frameworks and real-world examples

+

45 Hours
Hands-on per Level
Practical labs, tools and projects

=

75 Hours
Total per Level
Blended learning for maximum impact

Total Program Engagement

375
Total Learning Hours
Across Five Levels (75 Hours x 5 Levels)

Flexible Delivery Options

The pathway can be embedded into semester delivery, offered as modular bootcamp blocks, or delivered in a blended faculty-supported format.

Program Summary — Level-Wise Focus

1 Level 1
- AI basics
- Prompting techniques
- Productivity tools
- Finance use cases

2 Level 2
- Data analysis fundamentals
- Visualization and dashboards
- AI-supported decision making

3 Level 3
- Generative AI applications
- RAG basics
- Document intelligence for finance
- Finance workflows and use cases

4 Level 4
- AI agents for finance
- Automation and no-code workflows
- Human-in-the-loop design
- Real-world process improvement

5 Level 5
- AI product lifecycle
- Prototyping and development
- Deployment and scaling
- Capstone innovation project

Key Highlights

Productivity AI Tools
Industry-relevant tools for finance learning and work.

Real-World Mini-Projects
Hands-on projects with practical finance use cases.

Portfolio-Ready Outcomes
Build a strong portfolio to showcase skills and career readiness.

Faculty Enablement Compatible
Designed to support faculty teaching and adoption.

El Roi Nexus AI Platform Support
Access to El Roi Nexus AI platform, content and guided learning.

PROPOSAL FOR

Detailed Curriculum – Levels 1 & 2

From AI Literacy to Data-Driven Decision Making

Finance Track | Higher Education Institutions Across Africa



LEVEL 1 — AI Foundations & Intelligent Productivity

Build strong AI foundations and use AI tools for smarter academic and personal productivity.

A PROGRESSIVE AI JOURNEY ACROSS FIVE LEVELS

Industry Skills Covered

- What is AI and how it works
- Types of AI and real-world examples
- Prompt engineering basics
- AI productivity tools
- Research assistance
- Document drafting
- Presentations
- Spreadsheet support
- Responsible AI and ethics

Hands-on Use Cases

- **Summarize finance articles and reports** (use AI to extract key points from research papers and market reports)
- **Create study notes and flashcards** (generate concise notes and revision materials)
- **Prepare presentations and reports** (build slide decks and financial reports)
- **AI-powered communication and email drafting** (write professional emails for internships, networking and academic purposes)
- **Research and interview prep** (collect and summarize information for assignments and interviews)

Outcome



Learners confidently use AI tools for learning, communication and productivity.

LEVEL 2 — Applied Data Analysis & AI for Decision Making

Develop data skills and apply AI to analyse information and generate insights.

A PROGRESSIVE AI JOURNEY ACROSS FIVE LEVELS

Industry Skills Covered

- Data basics and data types
- Working with datasets
- Data analysis with Python or no-code tools
- Visualization and storytelling
- AI for market and consumer analysis
- Intro to finance analytics and dashboards
- Document intelligence
- AI for research and decision support

Hands-on Use Cases

- **Analyse market trends and customer behavior** (work with real financial and market datasets to identify patterns and trends)
- **Generate insights from survey data** (use AI to summarize and interpret survey or customer data)
- **Create interactive dashboards** (build visualizations using Python or no-code tools)
- **Research and compare information** (analyse financial data sources and market reports)
- **Automate data reporting** (set up AI-assisted workflows for regular financial reports)

Outcome



Learners work with real-world data, create visualizations and use AI to support academic and business decisions.

75 Hours per Level
30 Hours Theory + 45 Hours Hands-on

Flexible Delivery
On-campus, blended or fully online

Real-World Projects
Hands-on use cases in every level

Industry-Oriented Certification Readiness
Portfolio and career readiness

Productivity AI Tools in Every Level
Stronger impact and faster learning

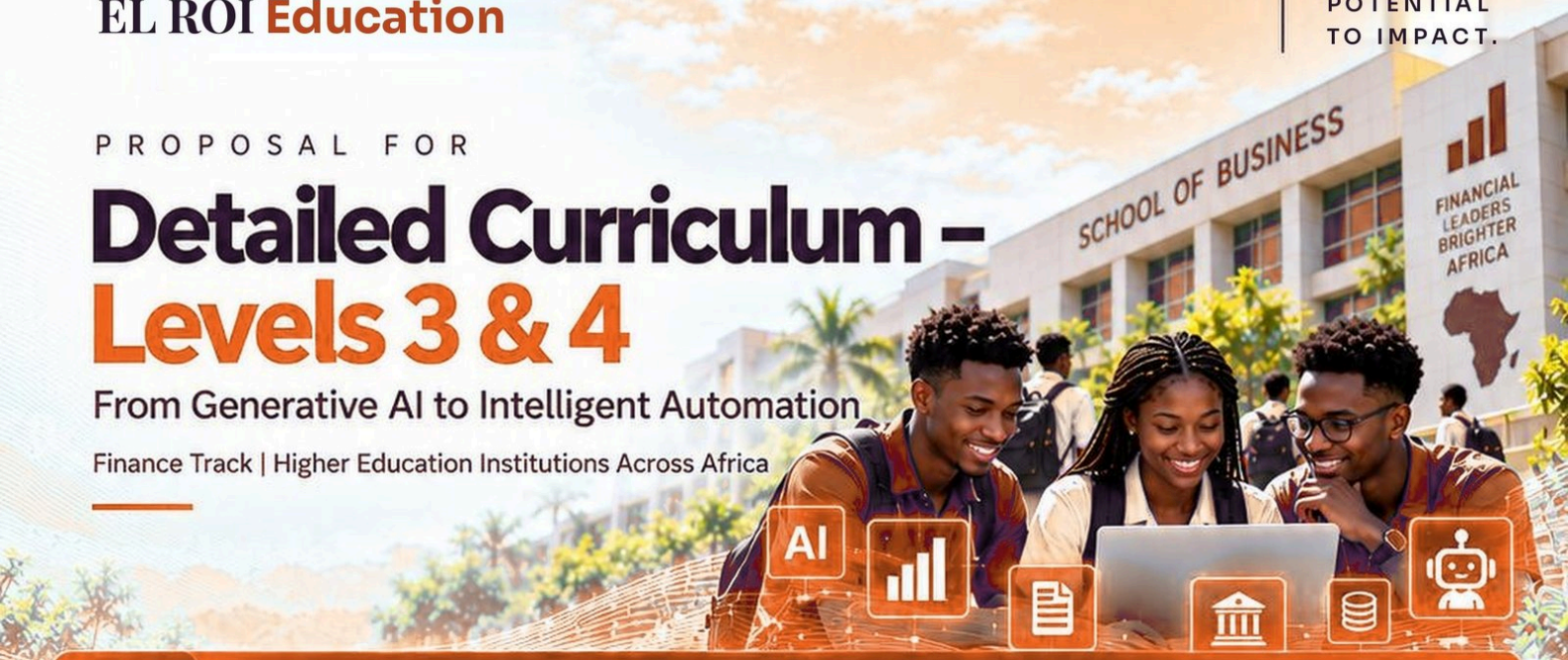
El Roi Nexus AI Platform
Platform access, content and guided learning

PROPOSAL FOR

Detailed Curriculum – Levels 3 & 4

From Generative AI to Intelligent Automation

Finance Track | Higher Education Institutions Across Africa



LEVEL 3 — Generative AI & Financial Domain Applications

Apply generative AI to solve real problems in finance, accounting and business decision-making.

A PROGRESSIVE AI JOURNEY ACROSS FIVE LEVELS

Industry Skills Covered

- Large language models and applications
- Advanced prompting techniques
- AI content generation (text, images, structured output)
- Document intelligence and knowledge assistants
- AI for finance, accounting, banking, insurance and economics
- Introduction to RAG basics
- Finance domain workflows and use cases
- Introduction to multimodal AI (text, image, audio)

Hands-on Use Cases

- Build a research knowledge assistant.
- Analyse and summarize annual reports or long documents.
- Create financial education or domain-specific content.
- Generate policy briefs and management summaries.
- Design simple infographics and insight summaries.

Outcome



Learners build useful domain-focused AI applications using GenAI and RAG basics.

LEVEL 4 — AI Agents & Automation for Finance Workflows

Build AI agents and workflow automations to improve productivity and solve complex problems.

A PROGRESSIVE AI JOURNEY ACROSS FIVE LEVELS

Industry Skills Covered

- AI agents and tool calling
- Multi-step agent workflows
- Automation with no-code and low-code tools
- Integrations with common applications
- Human-in-the-loop workflows
- AI for operations, marketing, HR and finance support
- Security, governance and responsible AI

Hands-on Use Cases

- Automate research and reporting workflows.
- Build an AI customer support helper.
- Create automated forms and document workflows.
- AI for invoice and operations tasks.
- Multi-step assistants for domain problems.

Outcome



Learners design and build agents that automate repetitive work and improve efficiency.

75 Hours per Level
30 Hours Theory + 45 Hours Hands-on

Flexible Delivery
On-campus, blended or fully online

Real-World Projects
Hands-on use cases in every level

Industry-Oriented Certification Readiness
Portfolio and career readiness

Productivity AI Tools in Every Level
Stronger impact and faster learning

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PROPOSAL FOR

Detailed Curriculum – Level 5 & Capstone Studio

Advanced Applied AI, Innovation & Real-World Impact

Finance Track | Higher Education Institutions Across Africa



LEVEL 5

AI Product Development & Innovation

Apply end-to-end AI product development skills to create impactful solutions for finance, business and society.

A PROGRESSIVE AI JOURNEY ACROSS FIVE LEVELS

Industry Skills Covered

- AI product design and user-centric thinking
- Problem framing and domain discovery
- Rapid prototyping and MVP development
- Integrating AI models and APIs
- Low-code or no-code solution building
- Solution testing and iteration
- Deployment fundamentals
- Measuring impact and ROI
- Future trends in AI and career pathways

Hands-on Use Cases

- Build a mini AI-powered finance application.
- Create a research or business MVP.
- Develop a banking, accounting, personal finance or fintech use-case solution.
- Solve a local challenge through AI.
- Present a showcase-ready prototype.

Learner Outcome



Learners design, build, test and present an end-to-end applied AI product or innovation concept.

Integrated Capstone Studio

A guided project-based experience to apply learning, build real solutions and showcase innovation.

Capstone Components

- Problem selection
- Solution scoping and planning
- Data/content setup
- Workflow design and implementation
- Testing and iteration
- Demo day presentation

Platform & Tool Exposure

- El Roi Nexus AI platform
- Prompt tools and AI assistants
- Dashboards and analytics tools
- No-code/low-code tools
- APIs and integrations
- Collaboration and project management tools

Final Deliverables

- Working prototype
- Presentation deck with impact analysis
- Documentation
- Portfolio artifact

75 Hours for Level 5
30 Hours Theory + 45 Hours Hands-on

Project-Based Learning
Real-world challenges and practical solutions

Industry-Oriented Certification
Portfolio and career readiness

El Roi Nexus AI Platform
Platform access, content and guided learning

PROPOSAL FOR

Delivery Model & Learning Experience

Flexible. Practical. Future-Ready.

A blended, hands-on learning experience designed for finance graduates to build real AI skills, work on practical projects and gain career-ready competencies for the evolving finance and financial services industry.



Delivery Options

Flexible delivery models to suit different institutional needs and program structures.

1 Immersive Modular Delivery

Intensive, hands-on learning blocks for rapid skill development.



- 5 to 6 day intensive blocks
- Guided practice and mini-projects
- On-campus delivery
- Faculty supported

2 Embedded Academic Delivery

Integrated, sustained learning within the academic calendar.



- Weekly or periodic sessions integrated into the academic calendar
- Blended delivery
- Continuous lab practice
- Platform enabled

Learning Methodology

A structured, practical and engaging learning journey from fundamentals to real-world impact.

1. **Learn** — Concepts, tools and best practices.
2. **Experiment** — Hands-on labs with guided notebooks.
3. **Build** — Mini-projects to apply skills.
4. **Apply** — Solve real finance use cases and industry problems.
5. **Demonstrate** — Present solutions, get feedback and build a portfolio.

Hands-on Components

A rich set of practical components to ensure active and applied learning.

- **Coding & No-Code Labs** — Hands-on practice with industry-relevant tools
- **Guided Notebooks** — Step-by-step exercises and explanations
- **Prompt Labs** — Learn to work effectively with generative AI
- **Mini-Projects** — Apply skills to realistic finance problems
- **Assignments** — Reinforce learning through targeted tasks
- **Capstone Development** — End-to-end project with real-world impact
- **Faculty Mentoring** — Guidance and feedback from experienced faculty
- **Platform Access** — Access to El Roi Nexus AI platform, datasets and resources

Program Delivery Highlights

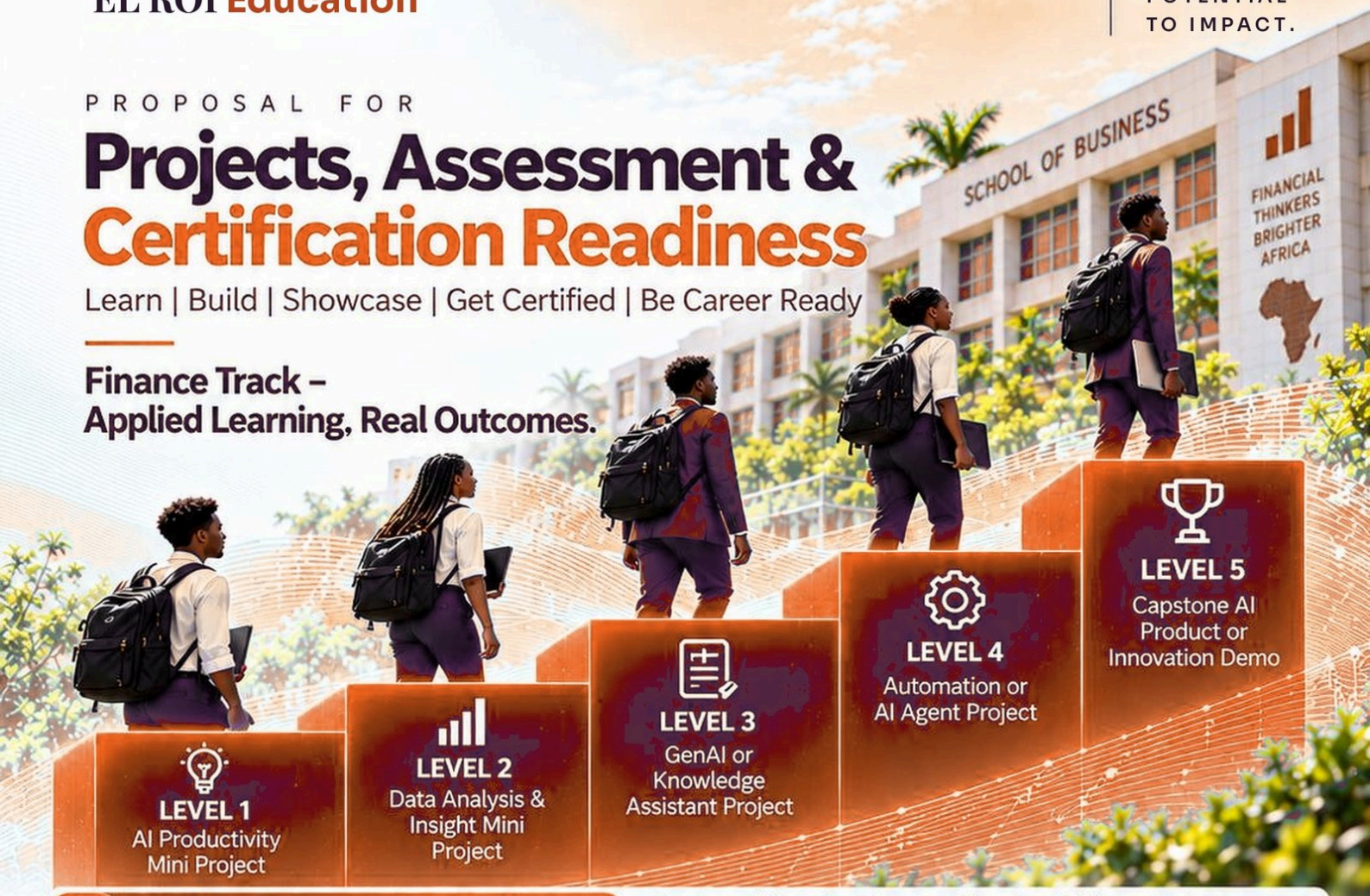
75 Hours per Level | 30 Hours Theory | 45 Hours Hands-on | Real-World Use Cases Across Disciplines | Project-Based Progression

PROPOSAL FOR

Projects, Assessment & Certification Readiness

Learn | Build | Showcase | Get Certified | Be Career Ready

Finance Track – Applied Learning, Real Outcomes.



1. Project Progression Roadmap

A structured, hands-on journey with real-world finance projects of increasing complexity across five levels.

1 — AI Productivity Mini Project
Use AI tools to solve daily finance tasks and improve productivity.

2 — Data Analysis & Insight Mini Project
Analyse financial datasets and generate insights using AI and data tools.

3 — GenAI or Knowledge Assistant Project
Build a finance-focused GenAI assistant using LLMs or RAG with curated knowledge.

4 — Automation or AI Agent Project
Design an automated workflow or AI agent to streamline a finance use case.

5 — Capstone AI Product or Innovation Demo
Develop and present a complete AI product or solution addressing a real-world finance challenge.

2. Assessment Framework

Continuous, practical assessment to build competency and ensure real learning.

20% Participation & Attendance
Active participation in classes, discussions and activities.

20% Quizzes
Short quizzes to reinforce key concepts and measure understanding.

25% Guided Labs
Hands-on lab exercises and practical tasks using real tools and datasets.

25% Mini-Projects
Level-based projects to apply learning in realistic scenarios.

10% Final Project / Demo
Capstone project and presentation evaluated on impact, technical depth and communication.

3. Certification Readiness

Build the knowledge and skills needed for industry-recognized AI certifications.

Foundation Stage

- AI awareness and ecosystem understanding
- Prompt engineering fundamentals
- Data literacy for finance applications
- Responsible AI basics

Advanced Stage

- AI application development for finance use cases
- Generative AI and RAG systems
- Agentic systems awareness and multi-agent workflows
- Analytics and workflow automation for business operations

4. Key Outcomes for You

Gain skills, credentials and real-world experience that set you up for success.

Portfolio-Ready Artifacts
Build a collection of projects, code and documentation to showcase your skills.

Stronger AI Productivity
Use AI tools to work faster, smarter and more effectively in finance roles.

Real Project Exposure
Work on practical, industry-relevant finance use cases and present your solutions.

Improved Employability
Gain skills and certification readiness to stand out in the job market.

PROPOSAL FOR

Commercial Model, Roles & Institutional Impact

A Flexible Pathway for Scalable AI Enablement in Higher Education



1. Commercial Model

Flexible and scalable partnership options to suit different institutional needs.

1 Per-Student Pricing

Transparent, affordable pricing per student.

2 Per-Level Engagement

Pricing options based on individual or multi-level engagement.

3 Bundled Programs

Cost-effective bundles across multiple levels.

4 Annual Platform Access Options

Institution-wide or cohort-based platform plans.

5 Faculty Enablement Add-ons

Optional training, certification and ongoing support for faculty and academic staff.

6 Custom Implementation Support

Onboarding, integration and program design support.

Final commercials depend on cohort size, program scope, delivery model and any customization or integration requirements.

2. Roles & Responsibilities

A partnership model with clear and complementary roles.

El Roi Education Responsibilities

Platform, Content and Enablement Support

- Provide platform access and technical infrastructure.
- Design and curate content and curriculum.
- Develop guided learning assets.
- Provide assessment templates and rubrics.
- Share real-world project frameworks.
- Support faculty onboarding and enablement.
- Provide progress reporting and learning analytics.

Institution / Partner Responsibilities

Local Delivery, Facilitation and Governance

- Student enrolment and cohort management.
- Classroom, lab and infrastructure coordination.
- Faculty facilitation and student support.
- Academic scheduling and calendar alignment.
- Local mentoring and project guidance.
- Attendance and participation tracking.
- Approvals and governance support.

3. Institutional Impact

Enabling long-term value for students, faculty and institutions.

AI-Enabled Student Learning

Future-ready skills for modern finance careers.

Stronger Project Portfolios

Real-world, industry-relevant finance AI projects and case studies.

Faculty-Supported Adoption

Build internal capacity through training, certification and ongoing support.

Internship & Innovation Readiness

Practical experience and exposure to finance AI workflows and tools.

Improved Employability

Graduates ready for finance AI roles, advanced study and industry opportunities.

Scalable AI Adoption

A repeatable model to expand AI education across departments and institutions.

Finance AI Readiness Outcomes

Students progress from AI literacy to real-world finance AI application, automation and innovation, ready for modern workplaces and advanced study.

PEOPLE
SKILLS
INNOVATION
REAL IMPACT