



AI FOR OFFICE OPERATIONS

Professional Certificate in AI for Office Automation

Course Code: IT_HM_I_011/25

Duration: 40 Hours

Delivery Format: Hybrid

Target Audience:

- Office Professionals
- Business Analysts
- Team Leads and Managers
- Small Business Owners
- Anyone Interested in Office Automation

Program Objectives:

- To equip learners with practical skills to integrate AI tools and concepts into daily office operations.
- To enhance productivity, streamline workflows, and improve decision-making through AI-powered solutions.
- To foster an understanding of ethical considerations and security implications of AI in the workplace.
- To enable participants to identify inefficiencies and design AI-powered automation solutions for various departmental functions.

Detailed Syllabus

Module 1 (5 hours): Introduction to AI in Modern Workplaces

Objective: To understand the fundamental concepts of AI and its transformative impact on modern office environments, and to identify key AI tools.

Topics:

- What is AI? Types of AI in business (Narrow AI, NLP, ML, RPA)
- Office 2.0: How AI is reshaping daily operations
- Tools Overview: ChatGPT, Otter.ai, Microsoft Copilot, Grammarly, Fireflies
- Future Skills for AI-augmented office roles

Activities:

- Interactive lectures on AI types and their business applications.
- Demonstrations of various AI tools (e.g., ChatGPT for content generation, Otter.ai for transcription).

Assessments:

- Reflection Note: Identify 3 ways your current daily routine can be enhanced with AI tools.

Module 2 (7 hours): AI for Document Management & Communication

Objective: To apply AI tools for efficient document creation, summarization, and management, and to enhance communication processes.

Topics:

- AI-Powered Writing: Summarization, email drafting, report automation (Grammarly, ChatGPT)
- Smart Meeting Notes & Transcripts: Otter.ai, Fireflies.ai
- Automated Document Generation & Approvals
- AI in Translation & Real-time Communication

Activities:

- Hands-on exercises using AI writing assistants to draft emails, summarize documents, and generate reports.
- Experimenting with AI meeting transcription and summarization tools.

Assessments:

- Use an AI tool to generate a business report, summarize a meeting, and draft an email.

Module 3 (7 hours): AI in Workflow Automation & Scheduling

Objective: To automate routine office workflows and optimize scheduling using no-code AI platforms and smart calendar tools.

Topics:

- Introduction to No-Code Automation: Zapier, Make.com
- AI for Task Management: Trello with AI, Notion AI, ClickUp
- Smart Calendars and Scheduling Bots

Activities:

- Case Studies: AI in HR ops, finance, and sales back offices
- Guided lab sessions on creating simple automations using Zapier or Make.com (e.g., connecting email to a task manager).

Assessments:

- Project: Automate a workflow using Zapier (e.g., auto-saving email attachments to a folder and notifying on Slack).

Module 4 (7 hours): AI for Productivity, Analytics & Insights

Objective: To leverage AI for data analysis, performance tracking, and personal productivity enhancement to support better decision-making.

Topics:

- Using AI for Data Cleaning and Analysis: Excel AI, Power BI with Copilot
- AI Dashboards: KPI tracking and visualization
- Personal Productivity Boosters: AI-based time blocking, task prioritization
- Decision Support Systems using AI

Activities:

- Hands-on exercises with AI features in spreadsheet software (e.g., Excel AI) for data cleaning and basic analysis.
- Introduction to AI-powered dashboard concepts for KPI tracking.

Assessments:

- Project: Create a mini-dashboard using an AI-powered analytics tool to track daily performance metrics.

Module 5 (6 hours): AI for Compliance, Security & Knowledge Management

Objective: To understand how AI can support compliance, enhance document security, and improve knowledge management, while also addressing ethical and privacy concerns.

Topics:

- Automating Compliance Checks: AI for SOPs, audits, and approvals
- AI-Powered Knowledge Repositories (e.g., Guru, Notion AI wikis)
- Document Security: AI-based redaction, risk detection
- Ethical & Privacy Concerns in AI at Work

Activities:

- Discussions on AI's role in automating compliance and auditing processes.
- Exploring examples of AI-powered knowledge management systems.

Assessments:

- Project: Build an AI-backed SOP system for onboarding or compliance documentation.

Module 6 (8 hours): Capstone Project - Smart Office Challenge

Objective: To apply comprehensive AI knowledge to identify workflow inefficiencies in a chosen department and design a practical AI-powered automation solution.

Topics:

- Final Briefing: Choose one department (HR, Admin, Sales Ops, Finance)
- Identify workflow inefficiencies
- Design an AI-powered solution using any tool or platform covered in the course

Activities:

- Guided project work with instructor support.
- Peer review and feedback sessions on project designs.

Assessments:

- Final Project: Create a 5-minute video + written brief explaining your AI-powered office automation solution.