



Vineet Sharma

AI, Generative AI & Agentic AI Trainer

Corporate AI trainer helping organisations move from AI awareness to practical application: AI at work, prompt engineering, AI agents, workflow automation and responsible AI adoption, grounded in 17+ years across BFSI, business analysis, agile and technology delivery.

Connectwithvintrainer@gmail.com

+91 89628 19210

www.vinscube.com

17+

Years of Industry Experience

BFSI, business analysis, agile and technology delivery: the foundation for practical AI training

10+

Organizations Served

Including JPMorgan, Morgan Stanley, Barclays, FIS, EY, Synechron, Bajaj Finance and more

150+

Training Programmes Delivered

Corporate workshops, university programmes and transformation engagements



Generative AI & Prompt Engineering

ChatGPT, Claude, Gemini and Microsoft Copilot applied to everyday work



AI Agents & Agentic AI

Hands-on agent building with instructions, knowledge, tools and approvals



AI Workflow Automation

Power Automate and Zapier flows that remove repetitive work



AI for Business & BFSI Operations

AI-powered analysis, reporting and operations

5000+

Learners Trained

Across BFSI, IT, FinTech and consulting organisations

10

AI Programmes Offered

AI at Work · Prompt Engineering · Agentic AI · Automation · BA & Delivery · BFSI · Responsible AI

TRUSTED BY LEADING BFSI, TECHNOLOGY & CONSULTING ORGANISATIONS

Corporate Training Engagements & Clients Served

Vineet's training footprint spans some of the most recognised names in global BFSI, technology and consulting, from multi-module programmes for technology teams to capital markets and agile workshops for banking and product organisations. Engagements range from domain, business analysis, agile, delivery and leadership training to industry-focused AI for BFSI at UST Global. This first-hand understanding of how business, operations and delivery teams work shapes every AI programme: identifying realistic use cases, designing relevant exercises and helping teams apply GenAI, agents and automation to the work they already do.



Jocata Financial Advisory & Technology

Delivered end-to-end Project Management and Agile Transformation training covering Scrum, Jira and stakeholder management for product and technology teams, with structured sprint simulations and real project assignments.



Synechron Technologies

Delivered Business Analysis, Product Owner and Capital Markets training emphasising SDLC, BRD, FRD, agile alignment and BFSI delivery readiness for functional and technology teams.



Bajaj Finance Ltd.

Designed Agile and Project Management workshops for credit, lending and digital transformation teams, focusing on sprint execution, backlog management and stakeholder governance frameworks.



Zensar Technologies

Led multi-module programmes on Agile, Jira, Business Analysis, Product Ownership and Project Management best practices for technology delivery and client-facing teams.



Imarticus

Conducted Capital Market and Treasury Domain Training for functional teams and Business Analyst learners, with sessions on project ownership, trade operations and client communication.



EY (Ernst & Young)

Delivered Trading Training for Hong Kong and APAC market programmes, providing global trade finance exposure, regulatory context and capital markets operational knowledge.



Kyndryl

Delivered Core Banking System (CBS) and Temenos-focused domain learning for technology and operations teams transitioning into banking technology roles.



UST Global – AI for BFSI

Industry-focused AI training covering banking, financial services, capital markets, payments, treasury, insurance and financial operations. Explored AI applications in document processing, operational reporting, compliance support, business analysis, workflow automation and intelligent decision support, with appropriate human oversight.



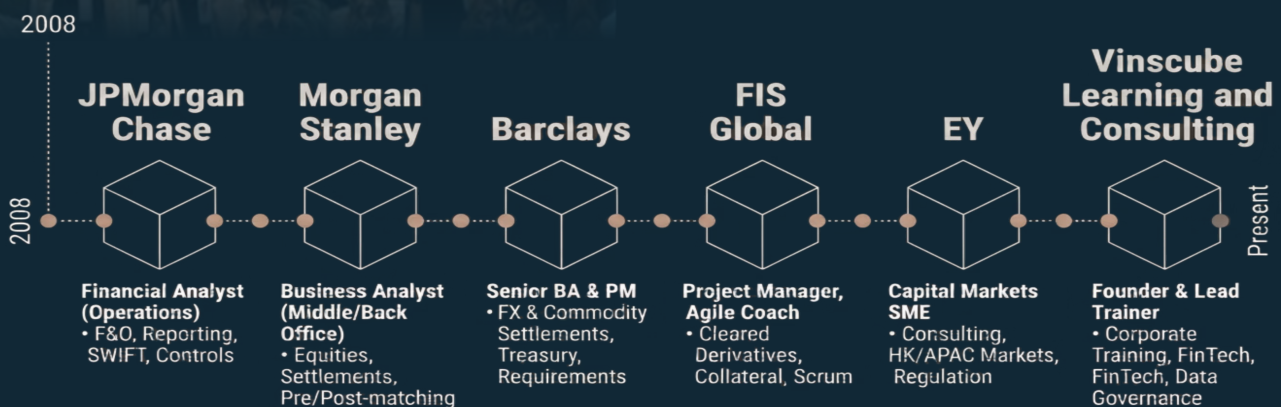
L&T – Leadership & Team Building

Corporate training focused on leadership effectiveness, team collaboration, interpersonal relationships, trust building and communication, empowering managers and teams to strengthen accountability, resolve conflicts, improve team performance and achieve shared business objectives.

From Global Banking & Technology Delivery to Applied AI Capability Building



17+ years inside global banks, technology programmes and corporate classrooms form the foundation for practical AI training. Having worked across front office, operations, product delivery and transformation, Vineet knows where time is lost in real workflows, and where AI can genuinely help.



This is why the AI training is grounded in real work rather than technology alone. Trade operations and settlements at JPMorgan and Morgan Stanley, FX and treasury at Barclays, agile product delivery at FIS Global and capital markets consulting at EY each involved processes full of documents, reports, requests, reconciliations and handoffs. Through Vinscube, that experience now translates into AI use cases participants recognise immediately, from requirements and reporting to document review and workflow automation.

Front Office Exposure

Trades, equities, derivatives, FX and fixed income: realistic context for AI use cases in markets

Middle & Back Office

Settlements, reconciliations and reporting: ideal ground for AI document review and exception handling

Product & Technology

Agile delivery, backlogs and requirements: the basis for AI-assisted business analysis and delivery

Consulting & Training

Consulting, transformation and capability building, now focused on GenAI, agents and automation

AI Expertise & Capability Matrix

AI CAPABILITY PROFILE

This capability portfolio covers the AI skills organisations need today, from generative AI fundamentals and prompt engineering to agent building, workflow automation and responsible adoption. Each area is taught through practical demonstrations and business scenarios, and is strengthened by deep domain expertise in BFSI, business analysis, agile and project delivery.

Each capability below is taught as an applied skill: what the tool does, where it fits in real work, how to use it well and how to verify the output before relying on it.

Generative AI & Prompt Engineering

Generative AI & LLMs

How large language models work, strengths and limitations, hallucinations, context and grounding, multimodal inputs, choosing the right tool for each task and setting realistic expectations for business use.

Advanced Prompt Engineering

Role, context, task and format structures, task decomposition, examples, iterative refinement, document-based prompting, output formatting, reusable prompt templates and libraries, and evaluating AI responses.

ChatGPT, Claude, Gemini & Copilot

Practical use of ChatGPT, Claude, Google Gemini and Microsoft 365 Copilot for research, writing, file analysis and Copilot in Word, Excel, PowerPoint, Outlook and Teams.

AI at Work & Business Operations

AI at Work & Productivity

AI-assisted research, writing, emails, reports, presentations, brainstorming and everyday business tasks for every role.

AI for Business Operations

Operational reporting, document processing, request classification, exception handling, recurring tasks and process improvement.

Meetings, Docs & Knowledge

Meeting summaries and actions, document analysis and knowledge assistants answering from approved content (RAG).

AI Agents, Agentic AI & Workflow Automation

AI Agents & Agentic AI

What makes an agent: instructions, tools, knowledge sources, triggers and actions. Agentic workflow design, multi-step tasks, multi-agent concepts, human-in-the-loop approvals, testing and monitoring. Workshop builds include Meeting-to-Action, Helpdesk and Request Classification agents.

No-Code & Low-Code Agents

Building agents in Microsoft Copilot Studio and custom assistants in ChatGPT, Claude and Gemini: instructions, knowledge grounding, connectors, actions, testing, publishing to Teams and safe configuration. Workshop build: Knowledge Assistant over approved organisational documents.

AI Workflow Automation

Microsoft Power Automate and Zapier flows that connect email, forms, spreadsheets, Teams, SharePoint and business applications. Triggers, conditions and AI steps that summarise, extract and classify information, with approval routing, error handling and monitoring. Workshop builds include Daily Operations Reporting and Document Review workflows that flag missing fields and inconsistencies for human review.

AI for Business Analysis & Project Delivery

AI-Powered Business Analysis

AI-assisted requirement elicitation, interview and workshop preparation, process documentation, BRD and FRD drafting, user stories, acceptance criteria, gap and impact analysis, test scenarios and traceability, combined with deep business analysis, product ownership and agile expertise (CBAP, CSPO, CSM, SAFe). Workshop build: a Business Analysis Assistant that drafts requirements, user stories, acceptance criteria and test scenarios for analyst review and refinement.

AI for Project Management & Delivery

AI-supported project charters, plans, RAID logs, status reports, stakeholder communication, meeting summaries, sprint and backlog support, risk identification and executive reporting, built on PMP-certified project management, PMO and agile delivery experience across global BFSI and technology programmes.

Data, BFSI, Responsible AI & Domain Foundation

AI for Excel, Data Analysis & Reporting

Exploring spreadsheets with AI, formula generation, data cleaning, trend and variance analysis, summarising findings and drafting management reports, validated with Excel, Power BI and SQL. Workshop build: an Excel Analysis Assistant.

AI for BFSI & Financial Services

AI for banking operations, capital markets, payments, treasury, financial reporting, compliance support and document analysis, used as analytical assistance, with regulated decisions left to qualified professionals.

Responsible AI & Enterprise Adoption

Use-case identification and prioritisation, employee enablement, data privacy, information security, output verification, bias awareness, AI usage policies, governance, human oversight and value measurement for enterprise AI adoption.

Supporting Domain Expertise

Capital markets, payments, treasury, FinTech, BlackRock Aladdin concepts, data governance, insurance and US accounting, used to build domain-specific AI scenarios.

Corporate AI Training Portfolio

A modular portfolio of practical AI programmes that take participants from AI awareness to confident daily use, agent building and workflow automation. Each programme combines live tool demonstrations, hands-on labs and business case studies, and can be customised by role, industry and experience level, from new employees to managers and leadership teams.



AI at Work: GenAI for Productivity

Using ChatGPT, Claude, Gemini and Microsoft Copilot for research, writing, emails, reports, presentations, meeting summaries, document analysis, brainstorming and everyday business tasks. Includes a Meeting-to-Action agent demonstration. Designed for all employees starting their practical AI journey.



Advanced Prompt Engineering

Prompt structures, context setting, task decomposition, output formatting, iterative prompting, document-based prompting, reusable prompt templates and evaluating AI responses. Participants build a prompt library for their own role. For professionals who want consistent, high-quality outputs.



Agentic AI & AI Agent Building

Understanding AI agents, instructions, tools, knowledge sources, workflow design, triggers, human approvals and testing. Guided builds in Microsoft Copilot Studio of a Knowledge Assistant, Helpdesk Agent and Document Review Agent. Designed for business users, analysts and technology teams.



AI Operations & Automation

AI in Business Operations: reporting, document processing, request classification, exception handling, knowledge retrieval and recurring tasks.
AI Workflow Automation: Power Automate and Zapier flows that connect business apps, automate repetitive steps and add AI with human approvals.



AI for BA, Delivery & Reporting

AI for Business Analysis & Project Delivery: requirements, user stories, acceptance criteria, process documentation, test scenarios and project reporting.
AI for Data Analysis & Reporting: spreadsheet analysis, formulas, trends and management reports, with validation.



AI for BFSI & Finance

Practical AI for banking operations, capital markets, payments, treasury, financial reporting, compliance support and document analysis. Clearly separates AI-assisted analysis from regulated decisions requiring professional judgement and approval.



Responsible AI & AI for Leaders

Enterprise AI Adoption & Responsible AI: use-case identification, employee enablement, data privacy, security, verification, governance and human oversight.
AI for Managers & Business Leaders: decision support, management reporting, workflow redesign, adoption planning and automation opportunities.

Hands-On AI Training Methodology

Every programme follows one principle: participants learn AI by using it on real work. Sessions move quickly from concept to live demonstration to hands-on practice, writing and refining prompts, analysing documents and data, building agents and automating workflows. Participants apply each technique to their own tasks, so they leave with reusable prompts, draft solutions and the judgement to use AI responsibly.



Live AI Demonstrations

Facilitator-led sessions using ChatGPT, Claude, Gemini and Microsoft Copilot live, with real-time Q&A and pacing adapted to the audience.



Real Business Case Studies

Scenarios informed by experience at JPMorgan, Morgan Stanley, Barclays, FIS and EY, covering banking operations, capital markets, analysis and delivery, so every AI technique is tied to a recognisable task.



Hands-On Prompt Labs

Participants write, test and refine prompts on their own tasks and build a reusable prompt library for their role and team.



Guided Agent Building

Step-by-step builds of workshop agents such as Meeting-to-Action, Knowledge Assistant and Helpdesk, with instructions, knowledge, tools and approvals.



Workflow Automation Labs

Power Automate and Zapier labs that connect business apps, automate routine steps, add AI processing and route outputs for human review.



Bring-Your-Own-Work Projects

Participants apply AI to a real task from their role, such as a report, process or recurring request, and leave with a draft solution and action plan.



Prompt Libraries & Toolkits

Ready-to-use prompt templates, agent design canvases, use-case identification worksheets, automation checklists and responsible AI guidelines for continued use after training.



Assessments & AI Verification

Pre-training diagnostics, exercises in checking AI outputs for accuracy and risk, and post-training feedback to measure learning.

Industry Practitioner. Applied AI Trainer. AI Capability Builder.

CREDENTIALS, TOOLS & VALUE PROPOSITION

Credibility rests on three connected strengths: 17+ years as an industry practitioner in global banking and technology, an applied approach that shows how AI tools, prompts, agents and automation fit real workplace scenarios, and an established corporate training track record. Certifications in project management, agile, business analysis, investment banking operations and capital markets validate the domain and delivery expertise that makes every AI programme business-relevant.

Professional Certifications

- PMP – Project Management Professional
- CSPO – Certified Scrum Product Owner
- CSM – Certified ScrumMaster
- CBAP / IIBA – Business Analysis Certification
- SAFe Agilist
- Lean Six Sigma Green Belt
- Jira and Confluence Certification
- CISI – Investment Banking Operations Certification
- NCFM – Equities, Derivatives and Bonds

AI Tools & Platforms

AI Assistants

ChatGPT, Claude, Google Gemini, Microsoft 365 Copilot

Agents & Automation

Microsoft Copilot Studio, Power Automate, Zapier

Data, Delivery & Collaboration

Excel, Power BI, SQL, Jira, Confluence, SharePoint, Teams

The Three-Pillar Value Proposition

The differentiator is a combination rarely found in one AI trainer: an industry practitioner who understands how business really works, an applied AI trainer who shows tools working on real tasks, and a capability builder who helps teams adopt AI responsibly. Participants learn not just what AI can do, but where it fits in their own work.



Industry Practitioner

17+ years across JPMorgan Chase, Morgan Stanley, Barclays, FIS Global and EY in investment banking, capital markets, payments, treasury and technology transformation: the business context behind every AI use case taught.



Applied AI Trainer

Demonstrates live how AI assistants, prompts, agents and workflow automation apply to real workplace scenarios, from meetings, reports and requirements to document review, operations and data analysis.



AI Capability Builder

Business-focused: helps professionals identify practical AI use cases, improve workflows and adopt AI responsibly with human oversight. Backed by 5,000+ learners trained and 150+ training programmes delivered.

Programmes are designed to help participants apply AI confidently to their own work, build practical agents and automations, and adopt AI with appropriate verification, data privacy and human oversight.

Email

connectwithvintrainer@gmail.com

Phone / WhatsApp

+91 89628 19210

LinkedIn

linkedin.com/in/connectwithvineet

Website

www.vinscube.com

I Founder & Lead Trainer, Vinscube Learning & Consulting | AI, Generative AI & Agentic AI Trainer | Prompt Engineering | AI Agents & Workflow Automation | AI for Business Analysis & Project Delivery | AI for BFSI | Capital Markets SME | Agile, BA & PM Trainer

For feedback and reviews please visit LinkedIn :- linkedin.com/in/connectwithvineet