4TH YEAR · ADVANCED TRACK

COMMERCE & FINANCE

# AI & Digital Productivity Program

AI for Financial Analysis, Business Reporting & Career Launch

*From Ledgers to Real-World Financial Insight.*

| 19 | 120 | 1 |
|---|---|---|
| DAYS | HOURS | REAL CLIENT |

Commerce & Finance Stream · 120-Hour Training Program · 19 Days

SECTION 1

# Program Overview

This Advanced Track is for final-year Commerce & Finance students preparing for final-year projects, higher studies and careers. Students already know the core tools from the Foundation Track, so this program does not re-teach them. Every day is built around a realistic Commerce & Finance brief: students choose their own tools, produce work a real person would use, and defend their choices.

**HOW THIS TRACK WORKS**

The Advanced Track is **outcome-centred**, not tool-centred. Each day opens with a short concept session, then moves to a brief. Students who explored more in 3rd year are rewarded with **Advanced Tier** versions of every challenge. The program ends with a **team project for a real client**.

**Fresh batch?** If students did not complete the Foundation Track, use the Day 1 Skill Check to find gaps and assign the matching Foundation home assignments (Days 1, 3, 7 and 8) as a catch-up kit. For two-year programmes (e.g. M.Sc., M.Com., MBA, B.Ed.), run the Foundation Track in Year 1 and the Advanced Track in Year 2.

**TARGET AUDIENCE**

B.Com. / M.Com., B.A. Economics and related commerce and economics programmes

**ENTRY REQUIREMENTS**

Completion of the 3rd Year Foundation Track recommended. No coding required.

## Learning Objectives

01 Design reusable, multi-step AI prompt systems.

02 Build evidence maps that handle conflicting sources.

03 Create and test a custom AI assistant without coding.

04 Critically analyse Annual Reports & Financial Statements with AI, knowing its limits.

05 Use AI responsibly for final-year projects, literature reviews and citations.

06 Audit AI for bias, misinformation and copyright risks in Commerce & Finance.

07 Design mixed-methods research under India's DPDP Act.

08 Analyse numbers and interviews and publish interactive dashboards.

09 Design team workflows with simple automation.

10 Build no-code websites and apps.

11 Produce podcasts and mini-documentaries with AI media tools.

12 Plan for higher studies, exams and jobs, and deliver a real client project.

SECTION 2

# Program Structure

| Phase | Days | Daily Load | Hours |
|---|---|---|---|
| Classroom Training | Days 1–15 | 4 hrs/day | **60** |
| Home Assignments | Days 1–15 | 2 hrs/day | **30** |
| Team Client Project | Days 16–18 | 8 hrs/day | **24** |
| Client Showcase & Exhibition | Day 19 | 6 hrs | **6** |
| **Total** | 19 Days | | **120 Hours** |

## Learning Journey

| | | |
|---|---|---|
| 1 | PHASE 1<br>**Level Up: Advanced AI Workflows** | Days 1–3 |
| 2 | PHASE 2<br>**Critical Thinking with AI** | Days 4–6 |
| 3 | PHASE 3<br>**Research, Data & Insight** | Days 7–9 |
| 4 | PHASE 4<br>**Building & Creating** | Days 10–12 |
| 5 | PHASE 5<br>**Career Launch & Client Project** | Days 13–19 |

**DAILY FORMAT**
4 hours classroom training + 2 hours home assignment, Days 1–15.

**ADVANCED TIER**
A harder version of every brief, assigned from the Day 1 Skill Check or chosen by students who want more.

**EXPECTED OUTPUT**
Every day ends with a concrete deliverable that feeds the final portfolio.

**RESPONSIBLE AI RULES FOR COMMERCE & FINANCE**

- Use fictional or anonymised financial data only. Never upload real bank, PAN, GST or client data.
- Independently check every AI-generated calculation, ratio and tax figure in the spreadsheet.
- AI output is not investment, tax or legal advice.
- Verify all figures against original annual reports, RBI or government sources.

DAY 01

PHASE 1 · LEVEL UP: ADVANCED AI WORKFLOWS

# Skill Check & Advanced Prompt Systems

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 1 (PROMPTING BASICS)

**LEARNING OBJECTIVE** Measure each student's starting level, then move from single prompts to structured, reusable prompt systems.

HOUR 1

## The Skill Check (diagnostic)

- A timed mixed challenge on research, NotebookLM, Docs, Canva and Sheets.
- Self-rating against a skills checklist.
- Results decide Standard or Advanced Tier challenges.

HOUR 2

## Advanced Prompt Structures

- Role, context, constraints, examples and output format together.
- Few-shot prompting: teaching AI with examples.
- Asking AI to question you before it answers.

HOUR 3

## Prompt Chaining & Iteration

- Breaking a big task into a chain of prompts.
- Self-critique and refinement prompts.
- Comparing ChatGPT, Gemini and Claude on the same chain.

HOUR 4 · PRACTICAL BRIEF

## The Financial Analysis Template

- Design a prompt chain that analyses any company's results.
- Test on three companies.
- Fix errors and document it.

**ADVANCED TIER**

Make the chain flag every number it could not find in the source.

**TOOLS**

ChatGPT, Gemini, Claude

**HOME ASSIGNMENT · 2 HOURS**

- Build five tested templates: ratio analysis, report summary, variance note, client email, budget review.

**EXPECTED OUTPUT**

**Finance Prompt Library**

DAY
02

PHASE 1 · LEVEL UP: ADVANCED AI WORKFLOWS

# Deep Research & Evidence Mapping

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 2 (RESEARCH & VERIFICATION)

**LEARNING OBJECTIVE** Run structured research that handles conflicting sources and reaches evidence-based conclusions.

HOUR 1

## Research Planning

- Turning a broad topic into a main question and sub-questions.
- Choosing the right source type for each question.
- AI deep-research modes and their limits.

HOUR 2

## Evaluating Sources

- Domain sources: annual reports, NSE / BSE filings, RBI, Economic Survey, MOSPI, data.gov.in, ICAI / ICSI, Google Scholar.
- Author, purpose, date, evidence and bias.
- Lateral reading; spotting fabricated AI citations.

HOUR 3

## Handling Conflicting Claims

- Mapping agreement and disagreement.
- Weighing evidence quality, not quantity.
- Writing balanced conclusions with stated uncertainty.

HOUR 4 · PRACTICAL BRIEF

## Evidence Map: A Policy Debate

- Investigate a debate (e.g. old vs new tax regime, crypto regulation).
- Map claims, data and counter-data.
- Present a conclusion with stated uncertainty.

**ADVANCED TIER**
Add RBI or MOSPI data that changes or sharpens one claim.

**TOOLS**
Perplexity, Google Scholar, ChatGPT / Gemini deep research, diagrams.net

**HOME ASSIGNMENT · 2 HOURS**

- Write a 2-page policy brief with eight verified sources.

**EXPECTED OUTPUT**

**Evidence Map + Policy Brief**

DAY
03

PHASE 1 · LEVEL UP: ADVANCED AI WORKFLOWS

# Build Your Own AI Assistant (No Code)

**4 HRS CLASSROOM · 2 HRS HOME** | NEW IN 4TH YEAR

**LEARNING OBJECTIVE** Create a custom AI assistant grounded in chosen materials, with clear instructions, limits and testing.

HOUR 1

## How Custom Assistants Work

- Instructions, knowledge files and grounding.
- Gemini Gems, NotebookLM and Custom GPTs (where available).
- Why grounded assistants still make mistakes.

HOUR 2

## Designing the Assistant

- Purpose, audience and tone.
- Writing instructions and boundaries.
- Preparing reliable source material.

HOUR 3

## Testing & Improving

- A test set of normal, tricky and off-topic questions.
- Scoring accuracy and source use.
- Revising instructions from failures.

HOUR 4 · PRACTICAL BRIEF

## Accounting Tutor Bot

- Build a Gem grounded on your syllabus or ICAI study material.
- Test with 15 problems, including tricky ones.
- Demo it live to the class.

**ADVANCED TIER**
Make it refuse tax-advice questions and redirect to official sources.

**TOOLS**
Gemini Gems, NotebookLM, Custom GPTs (where available)

**HOME ASSIGNMENT · 2 HOURS**

- Write a user guide with known limits.

**EXPECTED OUTPUT**

**Custom Commerce AI Assistant**

DAY
# 04

PHASE 2 · CRITICAL THINKING WITH AI

# Critical Analysis of Annual Reports & Financial Statements with AI

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 3 (DOCUMENT INTELLIGENCE)

**LEARNING OBJECTIVE** Use AI to compare and critique Annual Reports & Financial Statements while recognising where AI analysis falls short.

**HOUR 1**

## Human Reading vs AI Reading

- What AI does well: patterns, summaries, extraction.
- What it misses: context, nuance, judgement.
- Using AI as a second reader, not the first.

**HOUR 2**

## Comparative Analysis

- Comparing two or more documents side by side.
- Extracting recurring points and differences.
- Comparison tables with source-grounded evidence.

**HOUR 3**

## Testing AI Interpretations

- Checking every AI claim against the source.
- Spotting invented quotes, figures and citations.
- Writing your own judgement where AI is shallow.

**HOUR 4 · PRACTICAL BRIEF**

## Two-Company Comparison

- Compare two companies' annual reports with NotebookLM.
- Build a ratio comparison table.
- Critique AI's analysis line by line.

**ADVANCED TIER**

Find one figure AI got wrong or took from the wrong year.

**TOOLS**

NotebookLM, Claude, ChatGPT, Google Docs

**HOME ASSIGNMENT · 2 HOURS**

- Write a 1,000-word comparative financial analysis.

**EXPECTED OUTPUT**

**Comparative Financial Analysis**

DAY
05

PHASE 2 · CRITICAL THINKING WITH AI

# AI for Final-Year Projects & Academic Writing

**4 HRS CLASSROOM · 2 HRS HOME** | NEW IN 4TH YEAR

**LEARNING OBJECTIVE** Use AI responsibly to plan and support a final-year project report or dissertation in commerce or economics.

**HOUR 1**

## Planning the Project

- Choosing and narrowing a topic with AI brainstorming.
- Research questions, scope and chapter structure.
- A realistic timeline.

**HOUR 2**

## Literature Review with AI

- Finding and grouping related studies.
- Summarising papers with NotebookLM.
- OCR for scanned material (LightPDF / iLovePDF / Google Lens).

**HOUR 3**

## Citations & Integrity

- Zotero for references; APA / MLA basics.
- Verifying every AI-suggested reference exists.
- QuillBot and where paraphrasing becomes plagiarism; AI-use disclosure.

**HOUR 4 · PRACTICAL BRIEF**

## Project Report Sprint

- Choose a project topic and frame questions.
- Build a Zotero library of ten sources.
- Draft a chapter plan with AI disclosure.

**ADVANCED TIER**

Create a literature map with ten sources grouped by theme.

**TOOLS**

NotebookLM, Google Scholar, Zotero, QuillBot, LightPDF / iLovePDF, ChatGPT

**HOME ASSIGNMENT · 2 HOURS**

- Prepare a final-year project proposal pack.

**EXPECTED OUTPUT**

**Project Proposal Pack**

DAY
06

PHASE 2 · CRITICAL THINKING WITH AI

# AI Ethics, Bias & Misinformation

**4 HRS CLASSROOM · 2 HRS HOME** | NEW IN 4TH YEAR

**LEARNING OBJECTIVE** Examine how AI can mislead, exclude or harm in Commerce & Finance, and how to use it responsibly.

HOUR 1

## Bias in AI

- Where bias comes from: data and design choices.
- Risks in Commerce & Finance: confident but wrong calculations, finfluencer misinformation, investment scams and financial-data privacy.
- Under-representation of Indian and local contexts.

HOUR 2

## Deepfakes & Misinformation

- AI-generated images, audio and video.
- Verification: Google Lens, reverse image search, metadata, context.
- How misinformation spreads.

HOUR 3

## Copyright, Privacy & Consent

- Ownership of AI-generated content.
- Using other people's images, voices and data.
- Privacy when uploading material to AI.

HOUR 4 · PRACTICAL BRIEF

## Finfluencer & Scam Audit

- Audit AI answers on investing and loans for risky advice.
- Analyse three finfluencer claims and a deepfake ad.
- Recommend practical safeguards.

ADVANCED TIER

Publish a short scam-awareness verification thread.

TOOLS

ChatGPT, Gemini, image generators, Google Lens / reverse image search

HOME ASSIGNMENT · 2 HOURS

- Write an audit report and a personal Responsible Finance AI charter.

EXPECTED OUTPUT

**Finance AI Audit Report**

DAY
07

PHASE 3 · RESEARCH, DATA & INSIGHT

# Research Design & Data Collection

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 8 (SURVEYS)

**LEARNING OBJECTIVE** Design research that combines surveys with interviews, with proper sampling, ethics and data protection.

HOUR 1

## Research Design

- Quantitative, qualitative and mixed methods.
- Matching methods to research questions.
- Sampling basics and their limits.

HOUR 2

## Advanced Instruments

- Likert scales, branching logic and validation in Google Forms.
- Semi-structured interview guides.
- Pilot testing and fixing weak questions.

HOUR 3

## Ethics & Data Protection

- Informed consent and anonymity.
- India's DPDP Act 2023: collect less, store safely, delete on time.
- Free transcription: Otter.ai free tier, Docs voice typing.

HOUR 4 · PRACTICAL BRIEF

## MSME / Consumer Study Kit

- Plan a mixed-methods study of local businesses or consumers.
- Build a branching survey and interview guide.
- Pilot and revise.

**ADVANCED TIER**
Add a DPDP-compliant consent and storage note.

**TOOLS**
Google Forms, Otter.ai (free tier), Google Docs voice typing, ChatGPT

**HOME ASSIGNMENT · 2 HOURS**

- Collect 20 survey responses and two consented interviews.

**EXPECTED OUTPUT**

**Research Kit + Data**

DAY
# 08

PHASE 3 · RESEARCH, DATA & INSIGHT

# AI-Assisted Data Analysis & Insight Generation

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAYS 7 & 9 (SPREADSHEETS, CHARTS)

**LEARNING OBJECTIVE** Analyse numbers and interviews, using AI to assist while verifying every conclusion.

HOUR 1

## Cleaning & Preparing Data

- Fixing inconsistent responses and missing values.
- Coding open-ended answers into categories.
- Documenting every cleaning step.

HOUR 2

## Quantitative Analysis

- Pivot tables and group comparisons.
- Cross-tabulation of two variables.
- Correlation vs causation.

HOUR 3

## Qualitative Analysis with AI

- Thematic coding of transcripts.
- AI-suggested themes checked against quotes.
- Combining numbers and voices into findings.

HOUR 4 · PRACTICAL BRIEF

## Business Insight Report

- Clean data and run pivot tables and cross-tabs.
- Code interview themes with AI.
- Verify every number.

**ADVANCED TIER**
Find one AI conclusion that was overstated.

**TOOLS**
Google Sheets / Excel pivot tables, ChatGPT, Gemini, NotebookLM

**HOME ASSIGNMENT · 2 HOURS**

- Write a 3-page insight report with recommendations.

**EXPECTED OUTPUT**
**Business Insight Report**

DAY
09

PHASE 3 · RESEARCH, DATA & INSIGHT

# Data Storytelling & Interactive Dashboards

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 9 (DATA VISUALISATION)

**LEARNING OBJECTIVE** Turn findings into interactive visual stories that combine data with human context.

HOUR 1

## Data Storytelling

- The one finding that matters most.
- Story arc: context, tension, insight, action.
- Pairing charts with real voices.

HOUR 2

## Honest Visualisation

- Misleading axes and cherry-picking.
- Accessible colour and labelling.
- Annotated charts that explain themselves.

HOUR 3

## Interactive Tools

- Looker Studio dashboards on Google Sheets.
- Flourish interactive charts and maps.
- Napkin AI for turning written findings into visuals.

HOUR 4 · PRACTICAL BRIEF

## Financial Dashboard

- Build a Looker Studio dashboard from your data or sample financials.
- Annotate trends and ratios.
- Present in 3 minutes.

**ADVANCED TIER**
Add an interactive Flourish chart of RBI or market data.

**TOOLS**
Looker Studio, Flourish, Napkin AI, Google Sheets

**HOME ASSIGNMENT · 2 HOURS**

- Publish the dashboard with a short narrative.

**EXPECTED OUTPUT**

**Published Financial Dashboard**

DAY
10

PHASE 4 · BUILDING & CREATING

# Multi-Tool Workflow Design & Automation

**4 HRS CLASSROOM · 2 HRS HOME** | NEW IN 4TH YEAR

**LEARNING OBJECTIVE** Design and run a complete workflow that connects research, analysis, design and delivery, with simple automation.

HOUR 1

## Thinking in Workflows

- Research Analysis Organisation Design Delivery.
- Stages, inputs, outputs and handoffs.
- Picking the right tool for each stage.

HOUR 2

## Team Collaboration

- Shared folders, naming conventions and versions.
- Comments, suggestion mode and version history.
- Running meetings on Google Meet.

HOUR 3

## Automation & Quality Control

- Zapier (free tier): e.g. Form Sheet email alert.
- Human review checkpoints for AI output.
- Checklists for accuracy and tone.

HOUR 4 · PRACTICAL BRIEF

## Month-End Close Sprint

- Teams map a mini month-end process for a shop.
- Automate one step with Zapier (Form Sheet email).
- Add review checkpoints.

ADVANCED TIER

Log every AI step with a human sign-off.

TOOLS

Google Drive, Google Meet, Zapier (free tier), Napkin AI, diagrams.net, Notion

HOME ASSIGNMENT · 2 HOURS

- Document the workflow as an SOP.

EXPECTED OUTPUT

**Workflow SOP + Diagram**

DAY 11

PHASE 4 · BUILDING & CREATING

# No-Code Digital Solution Building

**4 HRS CLASSROOM · 2 HRS HOME** | NEW IN 4TH YEAR

**LEARNING OBJECTIVE** Build a useful digital resource such as a website or simple app without programming.

HOUR 1

## Information Architecture

- Organising information for users.
- Sitemaps, navigation and page hierarchy.
- Writing for the web: short and scannable.

HOUR 2

## User Experience Basics

- Who is the user and what do they need first?
- Mobile-first design.
- Accessibility: readable text, alt text, contrast.

HOUR 3

## Building the Solution

- Google Sites for websites.
- Glide for simple apps from Google Sheets.
- Notion as a public resource page.

HOUR 4 · PRACTICAL BRIEF

## Finance Tool Build

- Build an expense-tracker app in Glide or a GST help website.
- Three linked screens or pages.
- Test with a user.

**ADVANCED TIER**
Embed your dashboard or tutor bot.

**TOOLS**
Google Sites, Glide, Notion, Canva

**HOME ASSIGNMENT · 2 HOURS**

- Complete the tool and collect feedback from two real users.

**EXPECTED OUTPUT**

**Live No-Code Finance Tool**

DAY 12

PHASE 4 · BUILDING & CREATING

# Narrative Media: Podcasts & Mini-Documentaries

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 11 (SHORT VIDEO)

**LEARNING OBJECTIVE** Move from short clips to longer narrative media built on research and real voices.

HOUR 1

## Narrative Structure

- Non-fiction story structure: hook, journey, resolution.
- Interviews as storytelling.
- Designing for a specific audience.

HOUR 2

## Podcast Production

- Episode planning and scripting with AI.
- Recording on a phone; cleaning audio in Audacity.
- ElevenLabs voice and Suno music, always disclosed.

HOUR 3

## Mini-Documentary Production

- Storyboards and shot lists.
- B-roll, Google Flow / Kling clips and permissions.
- Subtitles and bilingual versions with Bhashini.

HOUR 4 · PRACTICAL BRIEF

## Money Matters Podcast Pitch

- Pitch a podcast or mini-doc on a local market or MSME story.
- Script, storyboard and interview plan.
- Get peer feedback and lock the plan.

**ADVANCED TIER**

Produce a bilingual version.

**TOOLS**

CapCut, Clipchamp, Canva Video, Audacity, ElevenLabs, Suno, Google Flow / Kling AI, Bhashini

**HOME ASSIGNMENT · 2 HOURS**

- Produce the episode with one consented interview.

**EXPECTED OUTPUT**

**Finance Podcast / Mini-Documentary**

DAY 13

PHASE 5 · CAREER LAUNCH & CLIENT PROJECT

# Higher Studies & Competitive Exam Preparation

**4 HRS CLASSROOM · 2 HRS HOME** | NEW IN 4TH YEAR

**LEARNING OBJECTIVE** Use AI strategically to plan the next step after graduation: further study or competitive exams.

**HOUR 1**

## Mapping Your Options

- Exams and programmes: CA / CS / CMA, CUET-PG, CAT / MAT, bank PO and clerk, SSC CGL, UGC-NET Commerce.
- Eligibility, timelines and patterns.
- Comparing programmes with AI-assisted research.

**HOUR 2**

## Applications & SOPs

- Structure of a strong Statement of Purpose.
- AI feedback without losing your voice.
- Requesting recommendation letters.

**HOUR 3**

## AI for Exam Preparation

- A study plan with milestones.
- Practice questions and answer-writing with AI.
- Verifying facts against official sources.

**HOUR 4 · PRACTICAL BRIEF**

## My Commerce Next-Step Plan

- Choose CA/CS/CMA, MBA, banking exams or M.Com.
- Build a 6-month plan.
- Draft SOP or exam strategy.

**ADVANCED TIER**

Run an AI mock interview for MBA or bank PO.

**TOOLS**

ChatGPT, Gemini, Perplexity, NotebookLM, Notion

**HOME ASSIGNMENT · 2 HOURS**

- Finalise the plan and a NotebookLM revision notebook.

**EXPECTED OUTPUT**

**Next-Step Plan**

DAY
14

PHASE 5 · CAREER LAUNCH & CLIENT PROJECT

# Jobs, Freelancing & Portfolio of Real Work

**4 HRS CLASSROOM · 2 HRS HOME** | BUILDS ON 3RD YEAR DAY 14 (RESUME & LINKEDIN)

**LEARNING OBJECTIVE** Get job-ready: tailor applications to real postings, start freelancing and show real work.

**HOUR 1**

## Careers in the AI Era

- Roles for Commerce & Finance graduates: accounts, audit, banking, tax assistance, financial analysis, fintech operations.
- Skills AI changes and skills it makes more valuable.
- Skill-gap analysis against real job descriptions.

**HOUR 2**

## Freelancing & Pitching

- Freelance services, pricing, proposals and contracts.
- Platforms, safety and avoiding scams.
- Your 60-second pitch and handling tough questions.

**HOUR 3**

## Portfolio of Real Work

- Turning projects from both years into case studies.
- Problem process result.
- Publishing on Google Sites or Notion.

**HOUR 4 · PRACTICAL BRIEF**

## Apply for a Real Finance Role

- Pick a real posting in accounts, audit or banking.
- Tailor resume and cover letter.
- AI and peer mock interviews.

**ADVANCED TIER**

Send one real application or bookkeeping freelance proposal after review.

**TOOLS**

ChatGPT, Gemini, LinkedIn, Google Sites, Notion, Canva

**HOME ASSIGNMENT · 2 HOURS**

- Publish a portfolio with three case studies.

**EXPECTED OUTPUT**

**Portfolio + Tailored Application**

DAY 15

PHASE 5 · CAREER LAUNCH & CLIENT PROJECT

# Client Brief & Team Project Planning

**4 HRS CLASSROOM · 2 HRS HOME** | UPGRADE OF 3RD YEAR DAY 15 (INDIVIDUAL PROJECT)

**LEARNING OBJECTIVE** Form teams, meet a real client, understand their need and plan a deliverable they will actually use.

HOUR 1

## Meeting the Client

- Clients such as MSMEs, local shops, CA firms, cooperative societies, the college finance office, NGOs.
- Running a requirements interview.
- Client emails in Gmail: updates, meeting notes, scheduled send.

HOUR 2

## Scoping the Project

- In scope and out of scope.
- Deliverables, quality standards and success criteria.
- Risks and how to handle them.

HOUR 3

## Team Planning

- Roles: research, content, design, project manager.
- A three-day plan with daily checkpoints.
- Shared workspace in Drive or Notion.

HOUR 4 · PRACTICAL BRIEF

## The Client Pitch

- Structure the pitch: problem, plan, value; rehearse client Q&A.
- Pitch to the client and instructor; get an e-signed approval or requested changes.
- Update the plan the same day.

**ADVANCED TIER**

Prepare a one-page handover plan: how the client will maintain the deliverable after the program.

**TOOLS**

Gmail, Google Meet, Google Docs, LightPDF (e-sign), Notion, Trello

**HOME ASSIGNMENT · 2 HOURS**

- Write the approved project charter: client, problem, scope, deliverables, roles, timeline and success criteria.

**EXPECTED OUTPUT**

**Signed-Off Project Charter**

DAYS 16–18

# Team Client Project

Teams of 3–5 work for three full days on the project approved by their client on Day 15. Each day starts with a stand-up and ends with a check-in.

**DAY 16**

8 HOURS · TEAM

## Research & Client Foundation

Build the research and content foundation for the client deliverable.

- Morning stand-up: confirm roles and targets.
- Research and verify everything the client needs.
- Collect permissions; store any personal data safely (DPDP).
- Build the shared knowledge base and outline.
- Evening check-in with client or mentor.

**DELIVERABLES**

- Verified research base
- Permissions log
- Content outline
- Updated plan

**DAY 17**

8 HOURS · TEAM

## Build & Integrate

Produce the main deliverable and integrate all components.

- Create the core deliverable.
- Integrate data, visuals and writing.
- Run internal quality checkpoints.
- Send the client a progress email and working draft.
- Log feedback and agree on changes.

**DELIVERABLES**

- Working prototype
- Client feedback log
- Supporting materials

**DAY 18**

8 HOURS · TEAM

## Client Feedback, Refinement & Handover

Apply client feedback and prepare a usable handover.

- Apply the agreed changes.
- Final fact-check, proofreading and accessibility check.
- Test with real users where possible.
- Prepare the handover pack and user guide.
- Rehearse the final showcase.

**DELIVERABLES**

- Final deliverable
- Handover pack & user guide
- Showcase presentation

DAY 19 · 6 HOURS

# Client Showcase & Final Exhibition

| | |
|---|---|
| **30 min** | Welcome, registration and team setup |
| **45 min** | Exhibition and gallery walk (clients invited) |
| **3 hr 15 min** | Team presentations, live demos and client Q&A |
| **45 min** | Evaluation, client feedback and reflection |
| **45 min** | Recognition, certificates and handover to clients |

**PRESENTATION FORMAT**
Each team: 8 minutes presentation, 5 minutes live demo, 5 minutes questions from the client and panel. For larger batches, run parallel panels.

## Each Team Demonstrates

| | | |
|---|---|---|
| **01** The client and their problem | **02** Research process and evidence | **03** AI and digital workflow |
| **04** The final deliverable, live | **05** Client feedback and response | **06** Handover and future impact |

SECTION 3

# Suggested Client Projects

Each team delivers a project for a real client. Final scope is agreed with the client on Day 15.

PROJECT 01

### MSME Bookkeeping & Dashboard Kit

A bookkeeping system and dashboard for a local business.

**Deliverables:** Sheets system, dashboard, user guide, training video

PROJECT 02

### Financial-Literacy Campaign for a School / NGO

A campaign on saving, UPI safety and scams.

**Deliverables:** Posters, videos, workshop deck, survey insights

PROJECT 03

### Cooperative Society Report Summary

Simplify a cooperative's annual report for members.

**Deliverables:** Summary booklet, charts, presentation

PROJECT 04

### GST Help Website for Traders

A simple, verified GST help resource.

**Deliverables:** Website, FAQs, explainer videos

PROJECT 05

### Club Budget-Tracking App

A budget app for a college club or society.

**Deliverables:** Glide app, automation, user guide

PROJECT 06

### Consumer Insight Report

A consumer study for a local business.

**Deliverables:** Mixed-methods report, dashboard, recommendations

PROJECT 07

### Investment-Scam Awareness Podcast

A podcast series with a bank or NGO.

**Deliverables:** Three episodes, show notes, posters

YOUR OWN IDEA

### Propose Your Own

Students may propose an original project, subject to instructor and client approval on Day 15.

SECTION 4

# Assessment & Evaluation

| | |
|---|---|
| Classroom briefs & participation | 10% |
| Daily home assignments | 20% |
| Project charter & planning | 10% |
| Final deliverable quality & usefulness | 35% |
| Client / user feedback | 10% |
| Showcase presentation & teamwork | 15% |
| **Total** | **100%** |

## Final Project Evaluation Criteria

| | | | |
|---|---|---|---|
| Real value to the client or users | Depth and accuracy of research | Thoughtful choice and integration of tools | Critical, responsible use of AI |
| Quality and polish of the deliverable | Response to feedback | Teamwork and communication | |

## Tools Covered

| Category | Tools | Category | Tools |
|---|---|---|---|
| **AI Assistants** | ChatGPT, Gemini, Claude | **Data Analysis** | Sheets / Excel pivot tables |
| **Custom Assistants** | Gemini Gems, NotebookLM, Custom GPTs | **Dashboards & Visuals** | Looker Studio, Flourish, Napkin AI |
| **Research** | Perplexity, Google Scholar, deep research modes | **Automation** | Zapier (free tier) |
| **References & Writing** | Zotero, QuillBot | **No-Code Building** | Google Sites, Glide, Notion |
| **PDF Tools** | LightPDF / iLovePDF (OCR, e-sign) | **Media** | CapCut, Clipchamp, Audacity, ElevenLabs, Suno, Flow / Kling |
| **Verification** | Google Lens, reverse image search | **Teams** | Google Drive, Meet, Gmail, Notion, Trello |
| **Surveys & Interviews** | Google Forms, Otter.ai, Docs voice typing | **Career** | LinkedIn, Google Sites |

*Tool selection can be adjusted for free-plan availability, institutional access and internet connectivity. No paid subscription should be compulsory for students.*

SECTION 5

# Expected Program Outcomes

After completing the 120-hour Advanced Track, students should be able to:

| | |
|---|---|
| 1 | Design and run multi-step AI workflows for real projects. |
| 2 | Build evidence-based arguments from conflicting sources. |
| 3 | Create and test a custom AI assistant without coding. |
| 4 | Use AI responsibly for final-year academic work. |
| 5 | Recognise and audit AI bias, misinformation and privacy risks. |
| 6 | Run mixed-methods research and publish interactive data stories. |
| 7 | Build no-code digital resources and automate simple workflows. |
| 8 | Produce podcasts and mini-documentaries with AI media. |
| 9 | Plan for higher studies, competitive exams, freelancing and jobs. |
| 10 | Deliver a real project to a real client as part of a team. |

Graduates of the Advanced Track leave with a **published portfolio**, a **final-year project plan**, a **career or higher-studies roadmap** and a **real client project** they can talk about in interviews.

4TH YEAR · COMMERCE & FINANCE · ADVANCED TRACK

## From Ledgers to Real-World Financial Insight.

NO CODING REQUIRED · 120 HOURS · 19 DAYS