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COURSE BROCHURE

AI Agent Workflow Automation for Back-Office Teams Course

12 – 16 September 2027
Online

AI Agent Workflow Automation for Back-Office Teams Course

Ref: 1227_46149 **Date:** 12 – 16 September 2027 **Location:** Online **Fees:** 2900 GBP

AI Agent Workflow Automation for Back-Office Teams is a 1-week training course for process owners, automation leads and digital operations managers who want agents to complete multi-step finance, HR and procurement tasks, producing a Back-Office Agent Automation Blueprint. Agents that plan, call software tools and hand off to people can now clear queues that scripted bots could not. Jupiter Prime Training offers AI Agent Workflow Automation for Back-Office Teams to leaders running shared services.

Why AI Agent Workflow Automation for Back-Office Teams Matters Now

Shared service centres face rising transaction volumes, tighter close deadlines and staff tired of repetitive keying. Language-model agents can read invoices, query ledgers, draft supplier emails and route exceptions, yet an agent with broad system access can also post wrong entries or leak records at speed. Organisations that scope agents carefully, constrain their permissions and keep approvals where judgement matters shorten cycle times while protecting audit trails; those that grant open access invite costly reversals. The course frames controls with the NIST AI Risk Management Framework AI RMF and the ISO/IEC 42001 AI management system standard.

Who Gains Most from AI Agent Workflow Automation for Back-Office Teams

- Owners of accounts payable, expenses and month-end close processes
- Leads who run robotic process automation estates and plan their next phase
- Managers of HR operations handling onboarding, leave and records queries
- Procurement operations leads who process requisitions and supplier queries
- Internal control partners who approve automation changes to financial processes

A shared service centre gains most when its process owners, automation lead and control partner attend together.

AI Agent Workflow Automation for Back-Office Teams Capabilities

Participants decide which steps an agent may take alone.

- Assess candidate workflows for agent suitability against volume, variability and exception rates — process owners
- Specify the agent's goal, tools, permissions and stopping rules — automation leads
- Build human-in-the-loop approval points tied to value and risk thresholds — internal control partners
- Test agent behaviour against exception scenarios before release — operations managers
- Calculate automation benefit from cycle time, touchless rate and rework — finance sponsors
- Align agent rollout with role changes and staff communication — HR operations leads

Key AI Agent Workflow Automation for Back-Office Teams Terms

- AI agent — software driven by a language model that plans steps, calls tools and acts towards a goal.
- Tool calling — an agent's ability to invoke an application, database query or API to read or change records.
- Guardrail — a rule or filter that blocks an agent from unsafe actions, data or outputs.
- Touchless rate — the share of transactions completed end to end without human handling.
- Least-privilege access — granting an agent only the system permissions its task strictly needs.
- Exception queue — the list of cases an agent cannot resolve and passes to a person.

AI Agent Workflow Automation for Back-Office Teams Day by Day

Day 1: From Scripted Bots to Reasoning Agents

- Rules-Based Bots Versus Language-Model Agents — Choosing the Right Automation Type
- Back-Office Process Mining — Locating High-Volume, High-Variability Steps
- Agent Suitability Scorecard — Ranking Invoice, Onboarding and Requisition Flows
- Shared Service Workforce Impact — Anticipating Changes to Clerk and Analyst Roles
- Automation Estate Inventory — Mapping Existing Bots and Integrations

Day 2: Agent Architecture for Business Workflows

- Planner, Executor and Memory Components — Structuring a Multi-Step Agent
- Tool Calling and API Connectors — Linking Agents to Ledgers and HR Systems
- Single-Agent Versus Multi-Agent Patterns — Splitting Work Across Specialised Agents
- Prompt and Instruction Specifications — Defining Goals and Stopping Rules
- Document Extraction Agents — Reading Invoices, Contracts and Forms

Day 3: Guardrails, Permissions and Approvals

- Least-Privilege Access Profiles — Limiting What an Agent Can Change
- Human-in-the-Loop Approval Thresholds — Routing Payments and Exceptions to People
- Segregation of Duties for Agents — Preserving Financial Control Principles
- NIST AI RMF and ISO/IEC 42001 Controls — Documenting Agent Oversight
- Action Logging and Audit Trails — Evidencing Agent Decisions for Auditors

Day 4: Testing, Monitoring and Measuring Benefit

- Exception Scenario Testing — Probing Agent Behaviour Before Go-Live
- Hallucination and Wrong-Action Detection — Catching Errors in Postings
- Operational Monitoring Dashboards — Tracking Touchless Rate and Exception Queues
- Automation Benefit Model — Calculating Cycle Time, Rework and Capacity Gains
- Rollout Sequencing — Expanding From One Queue to a Whole Process

Day 5: Practising the Back-Office Agent Automation Blueprint

- Accounts Payable Case — Applying the Agent Suitability Scorecard
- Employee Onboarding Case — Setting Approval Thresholds and Permissions
- Supplier Query Case — Testing Exception Handling Across Systems
- Benefit Baseline Worksheet — Projecting Touchless Rate and Capacity Release
- Back-Office Agent Automation Blueprint — Presenting Scope, Controls and Benefit

Applying AI Agent Workflow Automation for Back-Office Teams After the Course

- Score three back-office queues with the agent suitability scorecard and select one for a bounded agent trial.
- Agree human-in-the-loop approval thresholds and least-privilege access profiles with the internal control partner before any agent goes live.

AI Agent Workflow Automation for Back-Office Teams Questions FAQ

What is AI agent workflow automation for back-office teams, and why does it matter now?

It is the use of language-model agents to complete multi-step finance, HR and procurement tasks with defined controls. Agents can now handle variable work that scripted bots could not, so scoping and guardrails matter.

Which roles gain most from AI agent workflow automation for back-office teams?

Process owners, automation leads, HR and procurement operations managers and internal control partners gain most.

How does AI agent workflow automation for back-office teams differ from a technical AI agent engineering course?

It focuses on choosing, controlling and measuring agents in back-office processes rather than writing agent code. A technical engineering course trains builders; this one equips process owners to specify and govern what builders deliver.

What do you bring back from AI agent workflow automation for back-office teams?

You bring back a scored shortlist of back-office workflows, an agent specification with permissions and approval thresholds, and a benefit model. Exception test scenarios come with it.

AI Agent Workflow Automation for Back-Office Teams: The Way Forward

The Back-Office Agent Automation Blueprint first informs which queue receives a bounded agent trial and under which approval thresholds. Process owners use it to brief automation leads, and control partners use it to sign off permissions. After the first month live, revisit the touchless rate, exception volumes and approval thresholds before extending scope.