



AI ROADMAP FOR FINANCIAL SERVICES

Rapid Changes are Transforming the Industry

Why It Matters

Financial services firms must focus AI efforts to maximize business impact, aligning with strategic goals and market demands. AI is crucial due to technological advancements, increasing competition, and evolving economic and regulatory landscapes. These factors drive the need for AI to enhance customer interactions, streamline operations and improve risk assessment.


What AI Use Cases


are companies investing in today*


- 36% Risk Management
- 27% Algorithmic Trading
- 29% Portfolio Optimization
- 26% Document Management
- 28% Fraud Detection
- 26% Customer Experience


<https://resources.nvidia.com/en-us-2024-fsi-survey/ai-financial-services>


Imagine What *YOU* Could Do


 Fraud Detection & Prevention


 Predictive Analytics for Risk Management


 Credit Scoring & Loan Approval


 Customer Segmentation & Personalization

 Chatbots & Virtual Assistants

 Regulatory Compliance Monitoring

 Automated Underwriting

 Algorithmic Trading

 Sentiment Analysis for Investment Strategies

Questions You Should Ask

How do you analyze market trends & economic factors when setting pricing strategies?

Have you faced challenges in balancing profitability with affordability for consumers?

How do you navigate varying regulations across different jurisdictions?

Have you experienced difficulties in keeping up with regulatory changes in the insurance industry?

Can you provide insights into how economic fluctuations impact consumer demand for your insurance products?

What methods do you use to adjust pricing strategies based on changing consumer demand & economic conditions?

How It Works

We'll collaborate with your team to identify, prioritize and prototype AI use cases. We have a strong, repeatable process designed for AI engagements within the financial industry. Beginning with use case discovery and rationalization, we then move into rapid prototyping and conclude with a detailed implementation strategy for enabling your generative AI on top of a strong AI foundation. We come armed with the latest patterns, practices, tools and shortcuts to move you quickly from ideation to prototype and concrete plan.

- 1. Rationalize Financial Services Use Cases** Through targeted workshops, you'll gain financial services-specific insights and expert guidance on integrating AI into your existing operations. We'll help you identify and prioritize AI-driven solutions, ensuring each initiative is backed by solid business impact assessments. Begin your AI journey with a clear, actionable roadmap designed to transform the financial services sector.
- 2. Build Confidence in the Financial Industry** Through our interactive live prototyping and high-level proof of concept (POC) sessions, you'll see firsthand what your potential AI solutions could achieve. Engage in "Art of the Possible" demonstrations, whiteboard sessions and hands-on prototyping to refine requirements and designs collaboratively. Our goal is to simulate real-world performance using your data, enabling you to visualize the impact and effectiveness of the solution, ensuring that the final product aligns perfectly with your expectations and business needs. Build trust and gain assurance as we transform theoretical AI potential into a demonstrable prototype for financial services.
- 3. Create a Plan** Collaborative planning and architectural design ensure a smooth transition to your top-priority AI use case in the financial sector. Engage in agile planning sessions to create a prioritized backlog, capturing key implementation requirements. Build a robust project proposal with timelines and cost estimates. Design a tailored Azure architecture that aligns with your data flows, integrations, and future state requirements. By the end of this phase, you'll have a comprehensive, production-ready architecture plan, enabling confident deployment of a transformative AI solution.
- 4. Establish a Vision for Financial Services** Lay the groundwork for transformative AI success in financial services with a clear and actionable roadmap for your generative AI initiatives, aligning early projects with your strategic 12-month goals. We'll help you identify crucial projects and evaluate your foundational readiness, ensuring your business is primed to leverage AI at scale. Together, we develop a strategic plan that assesses your data estate and application readiness and sets the stage for effective AI integration across your organization.

Your next Azure engagement may be eligible for Microsoft funding

Accelerate Your Azure Journey With 3Cloud

3Cloud is the premier pure-play Azure partner in the ecosystem with unparalleled expertise in all things Azure. We specialize in delivering top-tier Azure infrastructure, cutting-edge AI, robust data & analytics and ground-breaking app development. Leveraging our extensive experience, advanced tools and customized accelerators, we ensure the quickest time to value for your Azure-based projects.

*Microsoft Partner Top Honors since 2017. Visit 3cloudsolutions.com for a full list of awards.

