How financial services firms can create long-term leadership in the age of AI

All it takes is one AI hallucination to sully a reputation in the high-impact, high-risk regulatory environment of financial services firms. Add autonomous agents into the mix and it's little wonder that banks and similar financial institutions are cautious about leveraging artificial intelligence.

The Salesforce acquisition of Informatica is good news for the financial sector, then, because it shines an even brighter light on the need for data transparency, deep contextual understanding, and rigorous governance.

Informatica helps financial services firms manage their data across systems both in the cloud and on-prem, allowing organizations to better analyze the data they collect by providing:

Data transparency

Informatica's advanced integration, catalog, and lineage tools show where data comes from, how it has changed, and how it is used—crucial for auditability and regulatory compliance.

Data understanding

Informatica's rich metadata, combined with Salesforce's unified data model, can empower AI agents to interpret, connect, and act on enterprise data with meaningful context.

Data governance

Built-in master data management (MDM), data quality controls, and policy management help ensure that all data driving AI is standardized, accurate, consistent, and secure.

The acquisition will enhance Salesforce's trusted data foundation, critical for deploying powerful and responsible agentic AI. The combination of Informatica's rich data catalog, data integration, and metadata management with the Salesforce platform will help establish a unified architecture for agentic AI, enabling AI agents to operate safely, responsibly, and at scale across the modern enterprise.

Unlock new capabilities

Combining Informatica's cloud-native capabilities with the Salesforce Data 360 and Agentforce platform can deliver:

More trustworthy data sources

Informatica's metadata management helps ensure that data is authoritative. For example, "principal amount" can mean something different for a home mortgage, a personal loan, a small business loan, or an auto loan, so it's critical that an AI agent understand the context of each data element and know what product is aligned to it. Informatica's metadata shows the authoritative data source and its location, allowing data to be cataloged for improved data governance.

Deeper customer understanding

Whether to avoid money laundering or to better serve customers with products they want, financial services firms have to clear a high bar for knowing their customers—whether they are consumers, institutions, counterparties, or other stakeholders. With accurate data in hand, the platform provided by Salesforce and Informatica can be used for a wide range of sales and marketing purposes as well as compliance, resulting in a 360-degree view of customers in the cloud across an organization.

Enhanced customer experience

This unified ecosystem can provide a powerful customer experience, from the moment customers become a lead, through the time they are onboarded, to the time they depart the firm. While the core use cases pertain to know your customer, money laundering, and fraud detection, more proactive examples take advantage of the combined capabilities of Salesforce and Informatica to provide personalized financial advice, customer service automation, and predictive analytics for customer retention. Best of all, this unified view consists of trusted data that can be leveraged again and again.

Take advantage of deep industry knowledge

KPMG has invested more than $2 billion to develop AI-enabled tools that drive value for companies in the financial sector. AI accelerators provide agentic designs and guiding architectural principles to help ensure that solutions address industry-specific use cases.

We are one of the first alliance partners to collaborate with Agentforce to create industry-focused incubators.[1] These touring innovation laboratories can be set up at client sites to guide AI strategies from concept through prototype and into full production. The incubator reduces overall project costs and identifies AI solutions that are fit for purpose.

KPMG also guides financial institutions through a well-established data migration and modernization process. Data federation, processing, and cleansing lay a solid foundation for implementing AI-powered capabilities.

KPMG and Salesforce have developed a trusted AI framework for financial services firms that applies rigorous monitoring, verification, and governance throughout the AI lifecycle. These checks help verify that AI agents are responsible, trustworthy, and free from bias.

[1] Press release, "KPMG Launches new AI incubator for Salesforce Agentforce," December 2024.

Achieve success with KPMG, Salesforce, and Informatica

Our strong alliance relationships with Salesforce and Informatica, along with our focus on industry-specific solutions, position the firm as a leading partner to help financial services clients capitalize on the Informatica acquisition and modernize their data and AI capabilities.

The Salesforce alliance is one of the fastest-growing global practices at KPMG, featuring 1,250 specialists who hold 5,800 Salesforce certifications. As a leading Salesforce alliance partner, KPMG has deep industry experience and solutions that drive peak execution and accelerate utilization of the Salesforce platform.

The Informatica alliance comprises more than 1,000 KPMG professionals globally holding over 1,400 Informatica certifications. We have been consistently recognized as an Informatica innovator and global growth leader since 2022.

KPMG has a developed a robust approach and suite of assets to help organizations harness the power of Data 360 and Agentforce with Informatica's leadership in managing the entire lifecycle of client data, helping organizations deliver on the promise of agents AI powered by Salesforce and Informatica.

Our deep relationship with Salesforce and Informatica and our well-established alliances with both firms will continue to help clients transform customer interactions, streamline operations, and provide personalized services at scale.

Connect with one of our team members to learn more.

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