

FINANCIAL SERVICES

# Industry Insider



**See how our strategic alliance with KPMG tackles challenges in the financial services industry. From big-picture problems to the specific needs of a chief technology officer (CTO), KPMG has it covered.**

KPMG helps financial organizations ideate, prioritize, and deploy high-impact and high-quality agentic AI solutions.



**Here's how KPMG** helps CTOs stay competitive while driving sustainable growth.



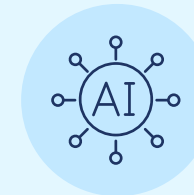
## **Successfully Implement AI**

Rapidly deploy trustworthy, ethical AI agents following proven strategies and industry best practices cultivated by KPMG. Award-winning tools, guidance, and roadmaps address the unique challenges of financial institutions.



## **Ensure Compliance**

KPMG can leverage deep financial sector expertise and industry-specific frameworks to ensure all technology solutions adhere to financial regulations. This reduces the risk of noncompliance and associated penalties.



## **Optimize Operations**

Transform customer interactions, streamline processes, reduce costs, and provide personalized services at scale. Deliver an exceptional experience that increases customer conversion and retention.



**Keep reading to find out how KPMG can help a CTO leverage the power of AI to gain a competitive advantage.**

# The Solution

KPMG helps financial institutions create customized, efficient, and compliant Agentforce solutions.

## Take advantage of deep industry knowledge.

**The Challenge:** When solution partners don't understand industry challenges, it can lead to poor prioritization, cost overruns, and delays. These can negatively impact the customer experience and pose compliance risks.

**The Solution:** KPMG has invested over \$2 billion in developing AI-enabled tools that drive value for companies in the financial sector. AI accelerators provide agentic designs and guiding architectural principles to ensure solutions address industry-specific use cases and personas.

## Accelerate value with a trusted AI framework.

**The Challenge:** Without a strict and tested framework, an AI agent could misinterpret data and deliver inaccurate or misleading information. This could result in financial loss and damage client trust.

**The Solution:** KPMG and Salesforce have developed a trusted AI framework that applies rigorous monitoring, verification, and governance throughout the AI lifecycle. These checks ensure autonomous AI agents are responsible, trustworthy, and free from bias.

## Modernize data for AI implementation.

**The Challenge:** Inaccurate, incomplete, or decentralized data stands in the way of implementing effective autonomous AI agents. Preparing data is often a significant obstacle to AI adoption.

**The Solution:** KPMG guides financial institutions through a proven data migration and modernization process. Data federation, processing, and cleansing lay a solid foundation for implementing AI-powered capabilities.

## Ensure a successful deployment.

**The Challenge:** Even with the right data, governance, and frameworks in place, the questions of cost, timeliness, and organizational impact remain.

**The Solution:** The KPMG AI Incubator helps businesses quickly turn theoretical concepts into reality. It can be set up at client sites to nimbly guide AI strategies from concept through prototype and into full production. This reduces overall project costs and ensures AI solutions are fit for purpose.

# The Scenario

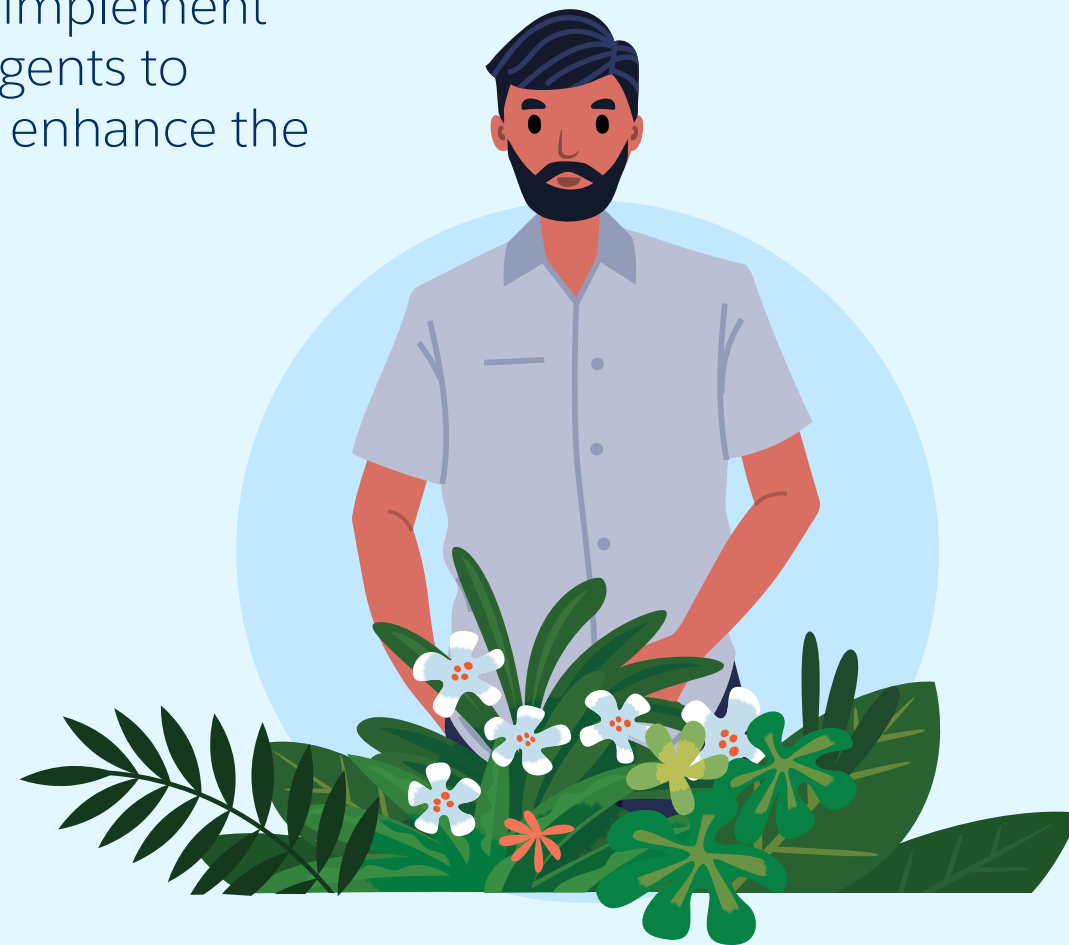
In this example, let's imagine how a CTO can partner with KPMG to implement functional and ethical AI agents to streamline operations and enhance the client experience.

## Rog Martinez

CTO

**Rog is responsible for strategic planning, project oversight, stakeholder communication, compliance, and security. He guides and supports cross-functional teams, giving them the technology tools they need for innovation and collaboration.**

**Rog and his team work closely with technology vendors and partners to integrate AI and other cutting-edge tools into their existing environment.**



### His Goals:

- Personalize services and improve client interactions
- Optimize operational efficiency
- Reduce costs while improving service delivery
- Ensure data security and client privacy

### His Challenges:

- Legacy systems don't allow AI implementation
- Resource constraints
- Complex financial regulations
- Resistance to new technology adoption

## KPMG solves Rog's challenges by helping him to:

### Create effective AI tools.

KPMG professionals have a track record of successfully implementing Agentforce technologies to create AI agents that quickly and efficiently execute data-driven tasks. Demonstrating innovation helps Rog position his company as a market leader.

### Rapidly deploy high-quality AI solutions.

KPMG tools, frameworks, and accelerators enable financial organizations to efficiently roll out purpose-built solutions. AI agents accelerate processes, reduce human error, and provide trusted information that enhances the customer experience.

### Modernize data management.

The proficiencies KPMG brings across the entire data ecosystem helps Rog revolutionize how he can leverage his data. Advanced modernization methodologies and platforms integrate data and systems. This enables AI adoption, minimizes maintenance costs, and boosts security and compliance.

**Learn more about KPMG**