

**Deloitte.**

In association with **Dataiku**



# ***GENERATING AI INSIGHTS FROM ADVANCED DATA ANALYTICS IN FINANCIAL SERVICES***

**Deloitte and Dataiku can help financial services and banking organizations spark innovation and collaboration to mitigate risk, improve regulatory compliance, industrialize the artificial intelligence (AI) lifecycle, and enhance outcomes.**

The financial services industry is entering an era of transformation driven by emerging technologies like AI-powered personalized banking, advanced fraud detection systems, Generative AI, and automated regulatory compliance. These technologies are poised to revolutionize services and operations—but industry leaders remain wary of the current economic landscape.

Concerns over inflation continue to drive loss costs and limit underwriting profitability, while high interest rates, threats of recession, and climate impacts test the industry's resilience. To respond, organizations need agility to pivot and adapt in the face of market volatility, regulatory changes, cost efficiency ratio pressures, and cybersecurity threats.

## **OPPORTUNITIES ACROSS THE FINANCIAL SERVICES SPECTRUM**

Before financial services organizations can harness the potential of AI, they should consider what it takes to build a platform for innovation, enterprise-wide collaboration, and AI governance. That starts by understanding how and where opportunity resides:



### **Insurance**

already having access to massive amounts of existing data, insurance organizations have a unique opportunity to expand their data capital and insights by tapping into new sources of information via more sensors in more places.



### **Banking and capital markets**

while facing the challenge of managing vast amounts of data effectively while finding new sources and partners to fuel innovation, banking organizations can employ data-driven AI capabilities to conduct more granular micro segmentation of customers and prospects, enabling them to predict needs and behaviors, and offer personalized services, such as loyalty programs, that can result in increased engagement and revenue.



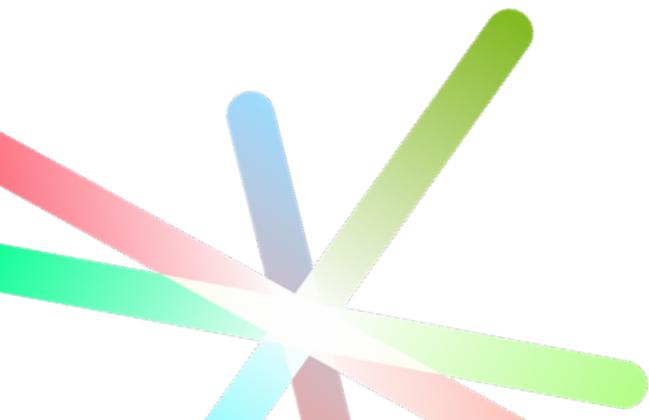
### **Investment management**

as leaders continue to increase capital investment in AI, data analytics, and data privacy, they're also looking for the right tools to help make better, faster, and often automated, investment decisions for their clients and organizations.

## **PUTTING ADVANCED TOOLS AND DEEP WELLS OF EXPERIENCE TO WORK**

By combining Deloitte's deep domain experience in financial services, global insights, and AI capabilities with Dataiku's leading data science and machine learning (ML) platform, we can help clients unlock the full potential of AI investments. Our combined solutions help clients optimize return on investment (ROI) by scaling data science projects, democratizing the AI lifecycle, managing AI risk and governance, and enhancing both business performance and financial outcomes.

Through our collaboration, clients can leverage our data domain experience to extract valuable insights from their data, integrate with Dataiku's AI/ML tooling capabilities, and deploy innovative solutions that drive business growth. Additionally, Dataiku's low-code interface empowers both technical and non-technical staff to explore AI use cases and bring valid solutions to production, tackling common bottlenecks in data preparation and navigating complex regulations on third-party data.



# **PREPARING YOUR AI PROGRAMS FOR A DYNAMIC REGULATORY ENVIRONMENT**

Ensuring your AI implementations adhere to today's rapidly evolving financial services regulatory requirements is key to planning for the present and future. Notable regulations like Sarbanes-Oxley (SOX), Dodd-Frank, and the General Data Protection Regulation (GDPR) impact financial services organizations and require strict adherence to maintain trust and integrity in financial operations and services.

Deloitte can help you prepare your AI programs for this evolving regulatory environment by using Dataiku to manage and document each step of model development, deployment, and operation. This can help optimize and enhance omni-channel engagement with clients, investors, and stakeholders. Risks associated with massive spreadsheets and other End User Computing need to be addressed and mitigated per the myriad regulatory bodies that oversee financial institutions.

Dataiku's platform is also employed for time series forecasting to support financial planning and risk management use cases. Along with Deloitte's deep understanding of the financial services regulatory environment, and our technical excellence in AI risk management, we can help clients enable governance, compliance, and ML operations (MLOps) to drive automation and industrialize processes.

As the financial services sector continues to demand reliable and efficient data modernization and big-impact AI deployments, Deloitte and Dataiku can help you establish standardized, democratized, automated, and collaborative AI development processes.



## **DELOITTE WITH DATAIKU— LEADERS IN AI, MACHINE LEARNING AND ANALYTICS**

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**Deloitte was named a leader in the Worldwide AI Services 2023 Vendor Assessment** by IDC for 3 consecutive years

**Dataiku was named a leader in Gartner's 2024 Magic Quadrant™** for Data Science and ML Platforms

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**Deloitte is a leader and a Star Performer** in Everest Group's Data and Analytics (D&A) Services PEAK Matrix® Assessment 2023

**Deloitte named a global leader for the eighth time** in 2022 Data and Analytics (including AI) Services Providers Worldwide

# WHY DELOITTE?



## Cross-domain expertise with global capacity

With offices and practitioners worldwide, including more than 220 certified Dataiku practitioners, Deloitte brings the depth and breadth of talent in nearly every industry to implement new platforms, transform processes, train the workforce, and identify value-driving AI use cases. Deloitte's AI and data engineering teams can provide industry-leading advice and operate complex solutions, all to enable our clients on their data products journey.



## An ecosystem of capabilities

We have the archetypes, workbenches, data warehouse, and data cataloging tools to help amplify and accelerate your programs. With an ecosystem of vendor alliances to deliver the ideal tools for your enterprise goals, we know where Dataiku sits in your technology stack, how to maximize its use and value, and how it complements other technologies as part of your data modernization initiatives. Deloitte is uniquely positioned to help design and build solutions that bring together the best of breed across leading technology vendors.



## Leader in AI risk management and governance

Deloitte works with some of the largest organizations in the world to develop risk management, legal, regulatory, and MLOps processes that support compliance at scale. As AI regulatory regimes emerge globally, we know how to help you use Dataiku to structure AI governance and satisfy rules and laws as they are codified. Deloitte's cybersecurity and advisory practices are instrumental in helping clients foster Trustworthy AI™, identify AI risks, and develop safeguards.



## Trusted partner in technology development

With Deloitte's renowned human capital consultancy, we know how to help you prioritize workforce capacity using Dataiku. We can lead Dataiku training for line of business users while crafting implementation to cater to business leaders and technologists alike. As a part of this, Deloitte can deliver customized onboarding—including data science bootcamps and use-case focused training—to help users discover new ways of working with Dataiku.

*Together, Deloitte and Dataiku help financial services organizations access precision insights and drive end-to-end customer engagement to accelerate business outcomes and establish a commercial model that's ready for the next era of transformation.*

## READY TO GET STARTED?

Please reach out to learn more about how Deloitte with Dataiku can help mobilize your workforce for enhanced AI collaboration, regulatory compliance, and operations at scale.

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