

From traditional to hyper-intelligent: The 7-step journey for FSI firms



The gap between customer expectations and legacy systems is widening. Financial services institutions (FSI) are under pressure to modernize—balancing real-time risk, regulatory compliance, and hyper-personalized client experiences. Yet many are still relying on fragmented systems and outdated processes.

Let's explore the **7 foundational steps** to help your FSI firm evolve into an agile, data-intelligent organization.

1

Create an insights-driven vision

Only 33% of companies make data-driven decisions.

A clear vision defines where you want to go—and how data, AI, and analytics help get you there.

2

Promote an insights-driven culture

Transformation requires tech, leadership, and buy-in.

Break silos. Encourage data fluency. Make insights part of everyday work.

3

Track industry challenges

48% of banking executives say economic shifts are their top risk.

Cyber threats, regulatory pressure, and new competitors aren't going away. You need agility.

4

Promote the benefits of data-driven capabilities

49% of firms made better decisions and 37% reduced costs after adopting data analytics and AI. Modern analytics helps boost revenue, lower costs, and streamline operations.

5

Prepare for the challenges of an insight-driven business

Only 36% of leaders trust their data's accuracy.

Trust, ethics, and governance matter more than ever in an AI-driven world.

6

Close the AI skills gap

40% of the workforce will need reskilling due to AI.

It's not just about hiring data scientists. Upskilling across the business is essential.

7

Leverage the best and most appropriate technology

Global IT spend in banking is forecast to hit \$1T by 2028.

Choose tech that scales, integrates, and fuels smarter decisions.

What's next?

Get the whitepaper to:

- Learn more about the 7 building blocks of hyper-intelligent FSI firms.
- Uncover the tools and technologies driving smarter decision-making.
- Align your modernization roadmap with industry-backed insights.

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