

Industry focus		Banking & Finc
Top industry message		Orchestrate your AI to retain your cu...
Industry Challenges	Moving quickly to move into next AI tech stack with a faneknsteien of platforms and dta and ERP, ECRM, EDI...	Aquire and continue to increase share of wallet from customer base.
Value promise	Modernize your IT stack	Build Lifetime Customers
Value copy	#1	Differentiate your company and the custoemr journey today. Linking steysmte now for immediate value return.
Workato differentiators	1. Trust & Governance 2. 250000 + connectors 3. One platform across your data / application architecture	1. 2. 3. Focus on sales, marketing and rev ops to use AI for incréting customer acquistition
Analyst substantiation		
Substantiation copy		

Financial Services		L0	
stomers while also inreasing returns.			
Talent while no hiring. Getting the most out of current staff, process and systems. Even if buildign new AI from gorun up how to they bridge gap?	People		
Achieve Operational Excellence	Arm your teams with AI tools		
increase connectivity and effeciency between your departments technologies and people.	Amplify your peoples skills, enhance thier productivity with AI tools.		
Effeciency equals a better bottom line.	Secure your relavance in the new world economic with AI agents.		

Customer proof		
Sub vertical breakdown #		#2

Sub industry		Wealth & asset management
Headline message	Why	
Industry challenges / Value drivers	Lots os AI vetndors, agents and siloed technolgies - a franchise of IT tech debt.	Moving horizon with service offering as cost of aquuiing custoemr is high.
Value proposition		
Product differentiators		
Sub industry solution areas	Investment Operations & Research:	Client Services & Onboarding:
Persona focus	IT leaders who are being asked by LOB owners to help implement AI.	
Solutions message		
description		
Use case focus (How)	4-6 use case scenerios	

:management		L1
Operations & Compliance:	Marketing & Growth	L2
Business LOB owners	Ex	
		L3

Competitors	Mulesoft	Boomi
Ecosystem connectors and partnerships	SAGE	Guidewire
Genies		
Customer proof points		
Customer quote		

Checklist for storybook.