Guiding Principles

Guiding Principles

- Use an agentic AI hook without losing iPaas/orchestration
- Ensure CIO appeal while still speaking to core IT personas
- Focus on specific use cases by segment and use industry-specific language
- SEO/GEO: Utilize key terms that FinServ IT personas would search for and optimize meta title (working with Brad Griffith)
- Leverage social proof (analyst stats.) and customer proof (case studies, logos, customer quotes)
- Design: leverage animation and video wherever possible to maximize engagement

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Financial Services Industry

Research

Research Process

1. Competitive overview (UiPath, Mulesoft, Boomi, Deloitte, Accenture)
2. Interview 8 AEs and CSMs with more than one Finance account
3. Review industry-specific marketing plays and PMM FinServ experience (Vertical Lite - Community Banks & Credit Unions, FinTech Embed Campaign)
4. Analysis of current Finance accounts with ARR > $50K

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Competitor Overview: Segments and Use Cases

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Competitor Overview: UiPath

Emphasizing agentic: loan origination (Know Your Customer), document processing, client onboarding, credit analyst productivity

Lending

Inefficient lending cycles? We can lend a hand.

Using AI, automation helps shorten the lending cycle by processing documents, automating mundane tasks, and giving employees a digital assistant.

Business use cases:

- Origination
- Loan processing
- Underwriting
- Funding
- Administration and monitoring
- Default management

CX

Give customers the info they need, via the channel they prefer.

Discover smarter self-service customer journeys, and equip contact center agents with data that dramatically lowers average handling times.

Business use cases:

- Account maintenance
- Data extraction
- Customer support
- Onboarding and account setup
- KYC and due diligence
- Fees and chargebacks
- Account closure
- Cash deposit/withdrawal

Cards & Payments

Tamp down fraud, speed up dispute resolution.

Find value in overlooked disputes by automating the classification and management of chargebacks and dispute resolutions.

Business use cases:

- Prospecting and applications
- Processing and approvals
- Payments and settlement
- Collections and servicing
- Dispute and fraud management
- Network management

Risk & Compliance

Ensure compliance with an always-on auditing machine.

Pivot away from periodic controls and towards continuous testing. Automation frees auditors from tedious data extraction so they can focus on what they do best: analyzing results.

Business use cases:

- KYC and client due diligence
- Transaction monitoring
- Screening and alerts management
- Risk monitoring
- Reporting internal/external

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Competitor Overview: Boomi

- "Process automation for **finance and insurance:** Gain flexibility and speed to respond to market changes and protect against risk."
- Primary focus is on **FinTech** integration solutions:
  - Technology modernization
  - Data strategy
  - Open finance
  - Banking-as-a-Service

Competitor Overview: Accenture & Deloitte

- Heavy on thought leadership/insights (blogs, reports, whitepapers) and featured case studies

Accenture Segments:

- Retail banking
- Commercial and corporate banking
- Central banks and regulators
- Specialty finance
- Payments

Deloitte Segments

- Banking and capital markets
- Insurance
- Investment management
- Real estate

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Workato Competitive Advantages/Disadvantages

- **Disadvantage: On-Prem Capability:** We are cloud-based, but have a virtual instance (as a proxy for on-prem). We also integrate seamlessly with on-prem solutions.
- **Time to Value & Cost Efficiency:** Unlike Boomi and Mulesoft, we don't require specialized developers and lengthy implementation processes. We help you optimize your OpEx and achieve rapid time-to-value.
- **Compliance & Security:** We are equal to Boomi and Mulesoft here, but this sets us apart from new entrants like n8n. Worth mentioning relevant certifications (SOC2, etc.)
- **Global Footprint & Data Residency:** We implement instances in local markets (e.g. UK, Japan) and comply with their local regulations. We are continually expanding our global data centers. This differentiates us from new entrants like n8n.
- **Universal connectivity:** Our platform simplicity allows us to work across FinServ's estate sprawl and legacy systems. We serve as a connector between your banking core and all enterprise applications.
- **Single-Platform / Operational Ease:** We are operationally simple, not complex: One run-time, no special ops needed. Leverage orchestration and agentic capabilities all in one platform
- **Scalable Pricing:** Differentiates us from Microsoft, Oracle, SAP
- **Low-Code Accessibility:** Helpful for smaller/regional banks that don't have large Dev teams
- **Auto-Scaling:** No need for forecasting, Workato grows with you — unlike Mulesoft, Boomi, Oracle
- **24/7 Customer support available:** Vital in a highly-regulated industry with sensitive information and assets.

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Workato Customer Analysis

FinServ Customer Segments

Sub-Segment	Customers	% of FinServ	ARR	% of FinServ ARR
FinTech/Digital First	29	40.3%	$6,031,761	45.5%
Wealth and Asset Management	18	25.0%	$2,660,941	20.1%
Banking (All)	13	18.0%	$1,680,488	12.7%
Other*	5	6.9%	$1,258,408	9.5%
Insurance	3	4.2%	$948,632	7.2%
Capital Markets	4	5.6%	$681,412	5.1%
Total FinServ	72	100%	$13,261,642	100.0%

*Other includes Fannie Mae, Technology Services Group, Law Debenture Group (specialty finance advisory) and captive finance for auto (Toyota & Volkswagen Financial Services)

*Analysis of Finance accounts with ARR>$50K

Competitor Overview: Mulesoft

- "Build the connected foundation for AI and agentic Financial Services."
- Core value props: Make core systems AI-ready, Deliver smarter customer experiences, Scale automation with AI
- Segment-specific value props are framed around integration
- **Banking**
  - Get better insights and personalization.
  - Onboard faster, build stronger relationships.
  - Simplify lending.
  - Boost efficiency and stay compliant.
- **Insurance**
  - Property and Casualty
  - Agencies and Brokerages
  - Life and Annuity
  - Group Benefits
- **Wealth and Asset Management**
  - Power modern, data-driven client experiences.
  - Deliver smarter client experiences by connecting your CRM, portfolio tools, and planning platforms.
  - Boost productivity and keep clients engaged.

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Banking Subsegments

Sub-Segment	Customers	% of FinServ	% of Banking	ARR	% of FinServ ARR	% of Banking ARR
Commercial banks	5	6.9%	38.5%	$848,139	6.4%	50.5%
Community banks & credit unions	7	9.7%	53.8%	$782,093	5.9%	46.5%
Investment Banking	1	1.4%	7.7%	$50,255	0.4%	3.0%
Total Banking	**13**	**18.1%**	100%	**$1,680,488**	**12.7%**	**100.0%**

*Analysis of Finance accounts with ARR>$50K

Proposed Segmentation

Financial Services

Banking	Wealth & Asset Management	FinTech	Insurance

Community Banks & Credit Unions
Commercial Banking

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Use Cases Across FinServ

Sample Customer Use Cases

- **Affirm (Fintech/Digital First):** Merchant API platform integrations, competitive analysis workflows, Agentic AI genies (FinAssist for FinOps Q&A, planned SEC filing genie and reconciliation/forecasting hygiene genie)
- **Revolut (Fintech/Digital First):** NetSuite-Coupa-Jira orchestration, IT/ITSM automation, Jira license optimization, AI document processing (IDP) for invoices, CICD governance, Zapier migration
- **Synchrony (Fintech/Digital First): RevOps –** Sales territory management (geo-segmentation) and Salesforce license optimization
- **Pagaya (FinTech/Digital First):** Salesforce-to-Snowflake data pipeline, external vendor data integration for customer servicing, automated file processing and data extraction, BI reporting, Bamboo-NetSuite integration for internal operations, lookup tables and data transformation, external vendor orchestration for report downloads and customer data aggregation.
- **Lightbulb Credit (FinTech/Digital First)**: Credit bureau integration (Experian, Equifax) for loan origination with 300-400K monthly tasks, statement/report generation from data providers (260K tasks), lookup table management for reference data, Workbot integration for Slack/Teams data queries

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Sample Customer Use Cases

- **Harris Williams (Banking - Investment Banking):** ERP transition
- **VIP Mortgage (Banking - Lending):** HR LoB, Snowflake ETL to ELT
- **Avenir Global (Wealth & Asset Management):** HR automation for internal operations, data extraction and reporting across 3 HR recipes (200K tasks), internal process orchestration
- **Edelman Financial (Wealth & Asset Management):** Access controls, security protocols, CRM to ERP, automated report generation
- **Brookfield Asset Management (Wealth & Asset Management):** Real-time sync between disparate enterprise apps and newly-acquired companies
- **Man Group (Wealth & Asset Management):** Workday integration (all modules), JML lifecycle management, AI/NLP help desk triage, AI orchestration with Python/LLMs, DevOps CI/CD, Salesforce enablement.
- **Fidelity (Wealth & Asset Management):** Aprimo marketing campaign automation, automated site creation workflows eliminating manual processes with $90K immediate cost savings, custom workflow development for GTM operations
- **Helia** (Insurance): Streamlined invoice generation and approval automation, cloud-native integration serving as central platform for IT problem-solving across tech stack, single unified user experience for cross-functional workflows

FinServ-Wide Use Cases

1. Enterprise Integration & Orchestration

- Connect ERP, CRM, and core systems seamlessly (Salesforce, Workday, ServiceNow, Jack Henry, Oracle, SAP, Microsoft)
- Accelerate ERP implementations by automating data migration from legacy systems and building real-time integrations across your new tech stack

2. Enterprise MCP

- Turn any recipe into a secure MCP server, giving AI assistants like Claude, ChatGPT, and Cursor safe, governed access to execute actions across 1,200+ financial apps
- AI-powered automation for credit decisioning, fraud detection, and customer service with human-in-the-loop approvals and complete audit trails
- Enterprise-grade security and compliance controls (SOC 2, GDPR) with role-based access and real-time monitoring

3. Regulatory Reporting & Risk

- Automate compliance and regulatory reporting
- Audit trail and governance workflows
- Risk and fraud detection automation

4. Intelligent Document Processing

- AI-powered document extraction and processing (IDP)
- Automated document routing and approval workflows
- Compliance document management

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FinServ-Wide Use Cases

5. Customer Experience & Compliance

- AI-powered customer service and support (CX Genie, Support Genie)
- KYC/AML compliance automation and streamlined onboarding
- Accelerated customer lifecycle management

6. Revenue Growth & Operations

- Marketing automation to increase revenue and client acquisition (win first-time credit buyers)
- Cross-sell and upsell orchestration across products
- RevOps automation (Salesforce license optimization, campaign creation, sales enablement)

7. Financial Operations

- Order-to-cash and procure-to-pay automation
- AI-powered reconciliation and financial close processes
- Real-time financial data synchronization across systems

8. LoB: HR and Payroll Automation

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FinTech / Digital First Use Cases

Customer Experience & Onboarding:

- Reduce customer onboarding time (customers expect instant account creation)
- **AI-powered CX Genie and Support Genie for customer inquiries**
- Secure agentic automation with MCP
- **KYC/AML compliance automation**

Revenue Operations & GTM:

- Overcome manual errors in campaign creation and native HubSpot/Salesforce limitations
- **Automate marketing and GTM to target first-time credit buyers**
- Sales territory management and CRM license optimization
- RevOps automation across Salesforce, marketing automation, and data platforms

Finance & Payments:

- Order-to-cash, procure-to-pay, AI-powered reconciliation
- **Payment integrations and billing automation (Embed)**
- Real-time financial data synchronization

Platform & Integration:

- API platform integrations for merchant partnerships
- Auto-scaling capabilities for rapidly growing operations

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Wealth and Asset Management

Investment Operations & Research:

- **Optimize analysis workflows and synthesize complex reports to inform investment decisions (Genie)**
- Portfolio rebalancing and trade order automation
- Real-time position reconciliation across custodians and administrators
- Market data aggregation and fund performance reporting

Client Services & Onboarding:

- **Support Genie for client inquiries - optimize satisfaction and reduce handle time**
- **Know Your Customer Genie - streamline complex documentation and manual KYC/AML processes**
- Accelerated client onboarding with automated compliance checks
- CRM to portfolio management system synchronization

Operations & Compliance:

- Fund accounting automation (NAV calculations, expense allocation)
- Regulatory reporting (SEC filings, Form ADV, compliance monitoring)
- JML (Joiner-Mover-Leaver) lifecycle management for employees

Marketing & Growth:

- Marketing automation to increase revenue and client acquisition
- Salesforce license optimization

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Banking - Commercial Banks

Customer Experience & Onboarding:

- Customer Support Genie - improve CSAT and reduce handle time
- Know Your Customer Genie - streamline KYC/AML documentation and compliance
- Accelerated commercial account opening and credit application processing

Revenue & Operations:

- Marketing automation to increase revenue and cross-sell opportunities
- Loan origination and underwriting workflow automation
- Commercial credit decisioning and approval workflows

Integration & Data:

- Enterprise system orchestration (Salesforce, Workday, ServiceNow, SQL Server, Snowflake, Oracle, SAP, Microsoft)
- Real-time data synchronization across loan origination, core banking, and CRM systems

Banking - Credit Unions and Community Banks

- Modernization & Cloud Migrations
- Back Office Automation
- **Banking as a Service**
- **Loan Origination & Processing**
- Data Ingestion for AI/ML Models
- Analytics & BI
- Client Lifecycle Management
- **Digital Account Opening**
- KYC & AML Compliance
- Security Ops
- Digital Banking
- Fraud Detection
- **Low-code accessibility for smaller dev teams**

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Banking - Lending

Loan Processing & Underwriting:

- **AI-powered document processing (IDP) for loan applications, income verification, property appraisals**
- Automated underwriting decisioning and credit scoring workflows
- Reduce loan application abandonment (60% abandon if process takes >5 minutes)

Operations & Compliance:

- Loan servicing automation and payment processing
- Regulatory compliance reporting (HMDA, CRA)
- Collections workflow automation

Integration & Data:

- Core banking to loan origination system (LOS) synchronization
- Additional key integrations (from connector library/partners)

Banking - Investment Banking

Deal Execution & Analysis:

- **Optimize analysis workflows and synthesize complex reports to inform investment decisions (Genies)**
- **AI-powered document processing (IDP) for pitch books, due diligence documents, regulatory filings**
- Deal pipeline and CRM automation (Salesforce to internal deal systems)

Client Services & Operations:

- Client onboarding with KYC/AML automation
- Regulatory reporting (SEC filings, transaction reporting)
- Real-time deal data synchronization across financial systems

Integration & Data:

- Enterprise system orchestration (Salesforce, Workday, financial reporting platforms)
- Legacy system to cloud data warehouse (Snowflake ETL to ELT)

Capital Markets

Trading & Operations:

- Trade reconciliation and settlement automation across multiple systems
- Real-time position and P&L reporting synchronization
- Post-trade processing and regulatory reporting (EMIR, MiFID II, Dodd-Frank)

Investment Research & Analysis:

- AI-powered document processing (IDP) for research reports, earnings calls, regulatory filings
- Optimize analysis workflows and synthesize complex reports to inform investment decisions (Genies)
- Market data aggregation and enrichment from multiple sources

Client Services & Onboarding:

- KYC/AML compliance automation for client onboarding
- Client reporting automation and distribution
- CRM to portfolio management system synchronization

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Insurance

Claims & Underwriting:

- FNOL intake automation, claims routing, and fraud detection
- AI-powered document processing (IDP) for claims documents, medical bills, repair estimates
- Quote-to-bind and policy renewal automation

Finance & Compliance:

- Premium reconciliation, commission processing, regulatory reporting automation (Genies)

Integration & Data:

- Legacy system to cloud data warehouse (Snowflake ETL to ELT)
- Real-time synchronization across policy administration, agency management, and core systems

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Key Pain Points & Use Cases (AE/CSM interviews)

- **Challenge**: competing with smaller, newer banks and fintechs for **first-time credit buyers**. Gen-Z consumers value **digital-first, mobile-friendly** options over traditional/legacy banks. Outdated data and manual campaign creation result in missed customer acquisition opportunities.
  - **Solution:** To acquire new customers, **marketing automation** & **GTM execution** is crucial. Workato enables GTM teams to act on real-time data, implement campaigns based on specific triggers, and win first-time credit buyers.
- **Challenge:** Antiquated, **intensive internal processes** are a drain on resources.
  - **Solution:** Workato streamlines tedious internal processes and eliminates manual work, without compromising trust and security.
  - **Finance and accounting:** Order-to-cash, procure-to-pay, vendor intake, **reconciliation**, and month-end close don't have to be complicated.
  - **HR & Payroll:** Payroll exception handling, onboarding,
  - **Internal knowledge base**: Deploy a genie that's an expert in your internal processes and resources, empowering every employee with instant answers on policies and protocols.
- **Challenge:** Fragmented, disconnected systems.
  - Solution: Connect Jack Henry, Salesforce, Workday, ServiceNow, SQL Server, Snowflake, Oracle, SAP, Microsoft, and more - and optimize your licensing.

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Customer Proof (External Approved)

Approved Logos and Customer Proof

- **Approved Logos:** Nasdaq, Credit Karma, Bread, Brookfield Asset Management, BNY, Helia, Intuit, Marqueta,, Northwestern Mutual, Novatti, Paysafe
- **Approved quotes:**
  - "MCP is the universal bridge between AI and enterprise action-unlocking secure, governed, and instant access to business capabilities. Workato is leading the charge in MCP by creating a standard for organizations to turn their systems, data, and processes into AI-ready services with limitless innovation." - Angela Stewart, Vice President of Enterprise Solutions at **Nasdaq**
  - "With Workato, we're able to acquire customers in minutes, transforming the way we expand our customer acquisition channels and grow our business." Kristin Fretz, Director of RevOps at **Bread Financial**
  - "With Workato automating our workflow and reducing wait times, we are able to offer funding in as little as 1 day, versus going through a bank where it can possibly take months to get funded." Deidre Jones, Application Technology Manager at **PaySafe**
  - "Workato was pivotal in helping us enhance our customer experience offering. They moved quickly, deployed quickly, listened to Helia at every step of the way, and strived for perfection. The Workato team actively sought out product feedback, demonstrating exceptional customer-centricity in building new functionalities we needed." - **Helia**
- **Case studies:** Altus Financial, Bread Financial, EQT, Fundbox, Helia, IC Verzekeringen, MX, Paysafe, Ripple, William Buck (+ Fortis Bank TBD)

Proposed Content Structure

FinServ Page Outline

1. **Hero section:** Overarching value prop. on preparing industry for AI - from integration to orchestration to agent deployment.
2. **Logo carousel:** Nasdaq, Coinbase, Intuit, Bread, Voya, Northwestern Mutual, Lemonade, Novuna, Revolut, Credit Karma, Visa, Ramp (logos to be confirmed with Nicole/Ben)
3. **Data:** 3-4 social proof metrics (analyst data)
4. **Enterprise MCP**
5. **Segments:** including key use cases and linked customer story/quote:
   - Fintech / digital-first
   - Banking
   - Wealth and Asset Management
   - Insurance
6. **Featured integration:** Jack Henry
7. **Featured partner:** API people
8. **Customer stories:** case studies, videos, quotes

Case Study Appendix

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Modernize and Transform with Workato

Nasdaq

6x

faster development times of automations.

Key Apps Connected

workday. Jira Marketo Power BI salesforce

VOYA FINANCIAL

1000+

recipes currently in production across 5 teams.

Key Apps Connected

workday. salesforce snowflake LeanIX servicenow Seismic ORACLE Financials Cloud

bread financial

84%

reduction in merchant acquisition timeline.

Key Apps Connected

salesforce docusign

BainCapital   Fannie Mae   toast   credit karma   BLOCK

Providing Customer Value

The Challenge
Voya, an ING subsidiary, was facing a number of issues; poor customer experience on its website, a large-scale cloud migration to Azure, many on-prem legacy scripts, and heavy ITSM processes, leading to heavy financial and time-related expenses.

The Solution
Through Workato, Voya adopted real-time integration with prebuilt capabilities, democratizing automation beyond IT. This scalable approach using on-prem agents, APIs, data hubs, and events enhances customer experience, reduces back-office costs, and allows staff to focus on higher-level tasks.

The Workato Advantage:

- 70%+ connected with on-prem agent.

- 1000+ recipes in production spread across multiple functions (data warehouse integration, ITSM, sales and marketing, and finance).

- 100s of apps and data connected.

Orchestrating:
Azure migrations, Data Ops, API Management, BPA, and RPA.

Connecting: Salesforce, Workday, ServiceNow, SQL Server, Snowflake, Oracle

Industry: Financial Services

Region: North America

Size: 6,000 employees

How Ramp Supercharged Efficiency

The Challenge
Ramp was facing multiple challenges across multiple teams that were hampering their growth. Specifically, they were struggling with manual errors in campaign creation, delays caused by native Hubspot/Salesforce dependencies, and difficulties in debugging.

The Solution
Ramp's vision was to move on from their point-to-point integration solution and pivot to an API-led approach, ultimately building to a scalable logging framework with superior retry processes. They were able to achieve that through Workato's shortened build time, numerous connectors, and SQL Collection.

The Workato Advantage:

- Reduced time to generate opportunities by 97%.

- Decreased L1 tickets by 80%.

- Accelerated debugging process, making it 12x faster.

"Through Workato, we were able to transform what was a 150 step process using Node JS Block into a 25 step process using SQL, leading to a significant increase in efficiency."

Kunal Singh
Biz Systems Engineering Lead

Orchestrating:
Growth Processes

Connecting: Hubspot, Salesforce, Snowflake

Industry: Financial Technology

Region: North America

Size: 1,000 employees

Bread Financial Supercharges Customer Onboarding

The Challenge
Bread Financial's Revenue Ops team, supporting multiple departments, faced significant challenges in acquiring and managing customer information effectively. Manual processes, disparate systems, and lack of data integration made it difficult to maintain a cohesive view of customers, hindering scalability and efficiency.

The Solution
Bread Financial leveraged Workato's advanced connectors and community recipes to automate workflows, replacing manual handoffs between teams (e.g., sales, compliance, legal, implementation, and success). They implemented a robust API-led approach, streamlining data movement across five systems and automating customer onboarding processes.

The Workato Advantage:

- Reduced customer onboarding time by 84%.

- Eliminated manual data entry, saving 30 minutes per customer for sales reps.

- Enhanced scalability and customer acquisition capabilities.

"If we didn't go down this journey, we wouldn't have the opportunity to expand our business in this short amount of time."

Kristin Fretz
Director of RevOps

Orchestrating:
Customer Onboarding

Connecting:
Salesforce, Docusign

Industry: Financial Technology

Region: North America

Size: 7,000 employees

Helia®

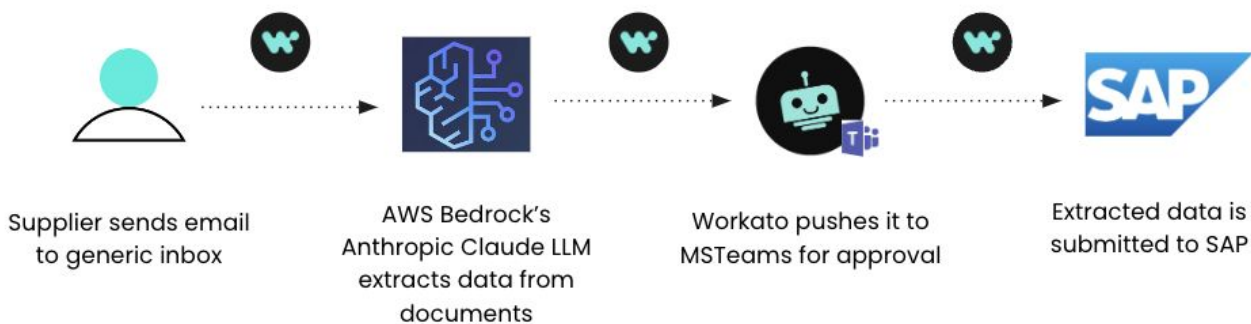🏢 >200 Employees   🌐 Australia   💼 Insurance

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Streamlined invoice generation and approval

Problem: Slowed down by technical debt when relying on custom Java code for integrations - difficult to maintain and required specialised resources. Especially inefficient whenever staff needed to hand off work to each other.

Solution: Streamline invoice generation and approval, by adapting a recipe found on Workato's community library

Supplier sends email to generic inbox → AWS Bedrock's Anthropic Claude LLM extracts data from documents → Workato pushes it to MSTeams for approval → Extracted data is submitted to SAP

Efficiency gains from optimising tools

4x more developers available

Accelerated AI-first strategy, with 35% time saving

"Workato was pivotal in helping us enhance our customer experience offering. They moved quickly, deployed quickly, listened to Helia at every step of the way, and strived for perfection. The Workato team actively sought out product feedback, demonstrating exceptional customer-centricity in building new functionalities we needed."

Neil Rodgers
Digital Solutions Director
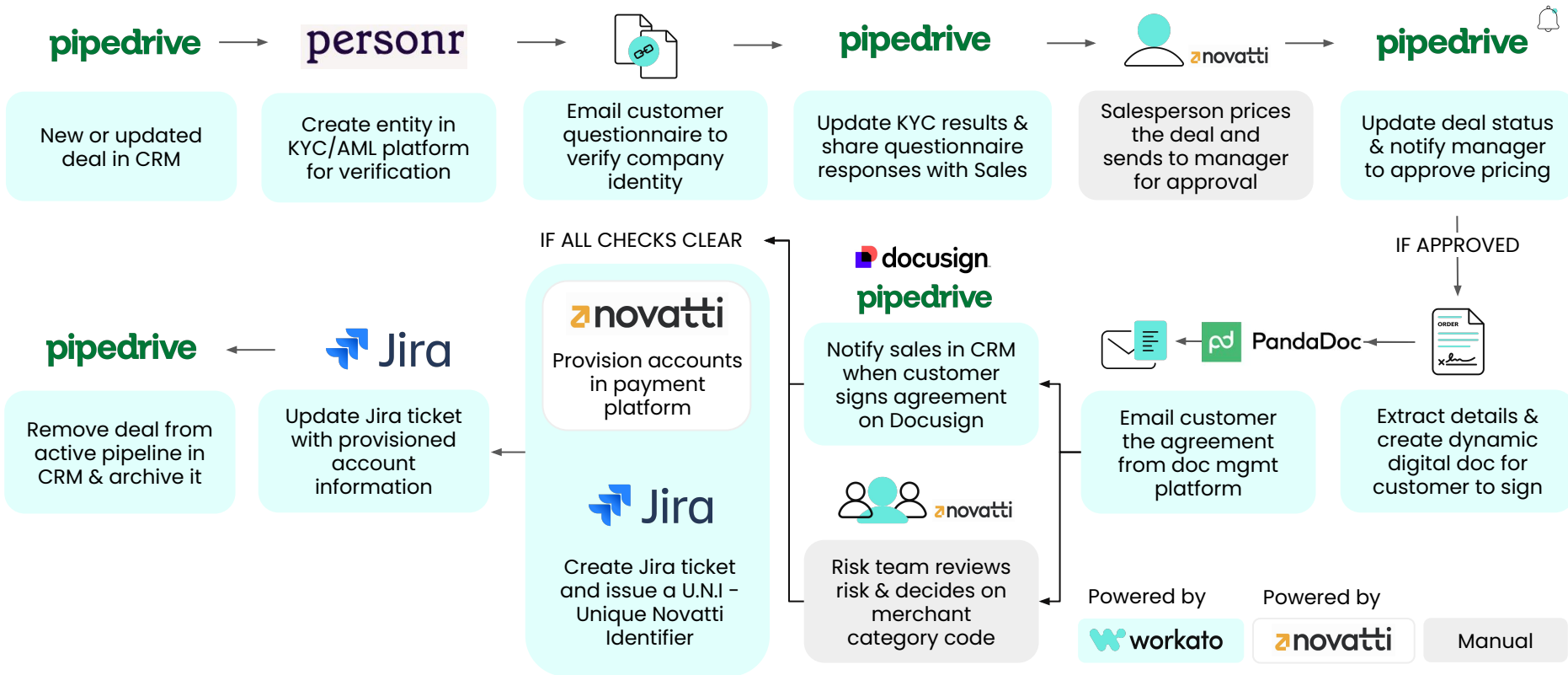
Helia.

CUSTOMER STORY

70 Employees   Australia   Fintech

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Merchant onboarding reimagined: From months to less than 5 minutes

pipedrive →
personr →
Email →
pipedrive →
(novatti) →
pipedrive

| New or updated deal in CRM | Create entity in KYC/AML platform for verification | Email customer questionnaire to verify company identity | Update KYC results & share questionnaire responses with Sales | Salesperson prices the deal and sends to manager for approval | Update deal status & notify manager to approve pricing |

IF ALL CHECKS CLEAR ←

docusign

pipedrive

IF APPROVED ↓

pipedrive ←
Jira ←

(novatti)

Provision accounts in payment platform

Notify sales in CRM when customer signs agreement on Docusign

PandaDoc ← ORDER

| Remove deal from active pipeline in CRM & archive it | Update Jira ticket with provisioned account information | | | Email customer the agreement from doc mgmt platform | Extract details & create dynamic digital doc for customer to sign |

Jira

Create Jira ticket and issue a U.N.I - Unique Novatti Identifier

(novatti)

Risk team reviews risk & decides on merchant category code

Powered by
workato

Powered by
novatti

Manual

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15 different systems integrated, including:

CRM
pipedrive
Native integration

KYC/AML
Personr
Custom integration

Doc Management
PandaDoc
Native integration

Support & Ticketing
Jira
Native integration

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Enterprise AI Platform for Business Orchestration

Data/App integration, Event Streams, ETL/ELT, Process Bots, Apps and Agentic AI

SALES

RISK & COMPLIANCE

LEGAL

SUPPORT

PAYMENTS PLATFORM

Single source of truth ensures real-time visibility for internal teams across novatti

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Proposed Copy/Content

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I. Hero Section

H1: Orchestrate Financial Services for the AI and Agentic Era

V1: Move from legacy core modernization to fully autonomous AI agents—all on one secure platform.

Workato delivers universal connectivity across core financial services systems, ERPs, and CRMs—plus Enterprise MCP for the context, trust, and accuracy AI agents need to succeed.
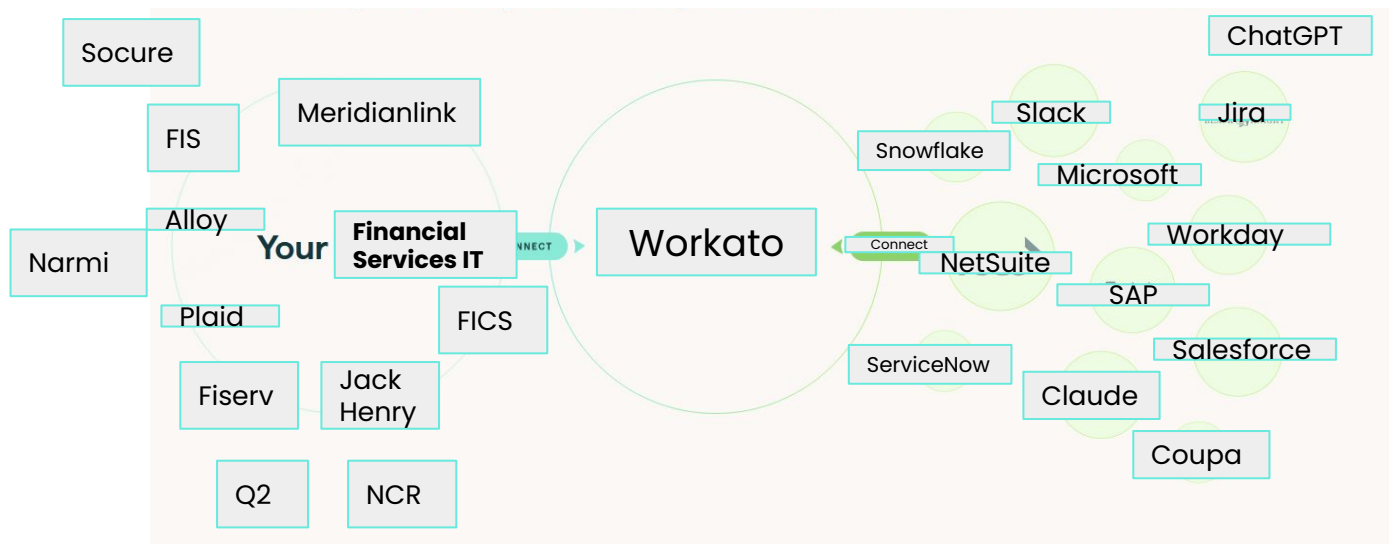
V2: Connect your core, ERPs, CRMs, and thousands of enterprise apps, so your systems are AI-ready. Then put AI agents to work with Enterprise MCP, which provides the context, trust, and accuracy agents need to succeed—backed by enterprise-grade security and governance controls.

Safely accelerate your financial institution into the agentic era on the #1 iPaas.
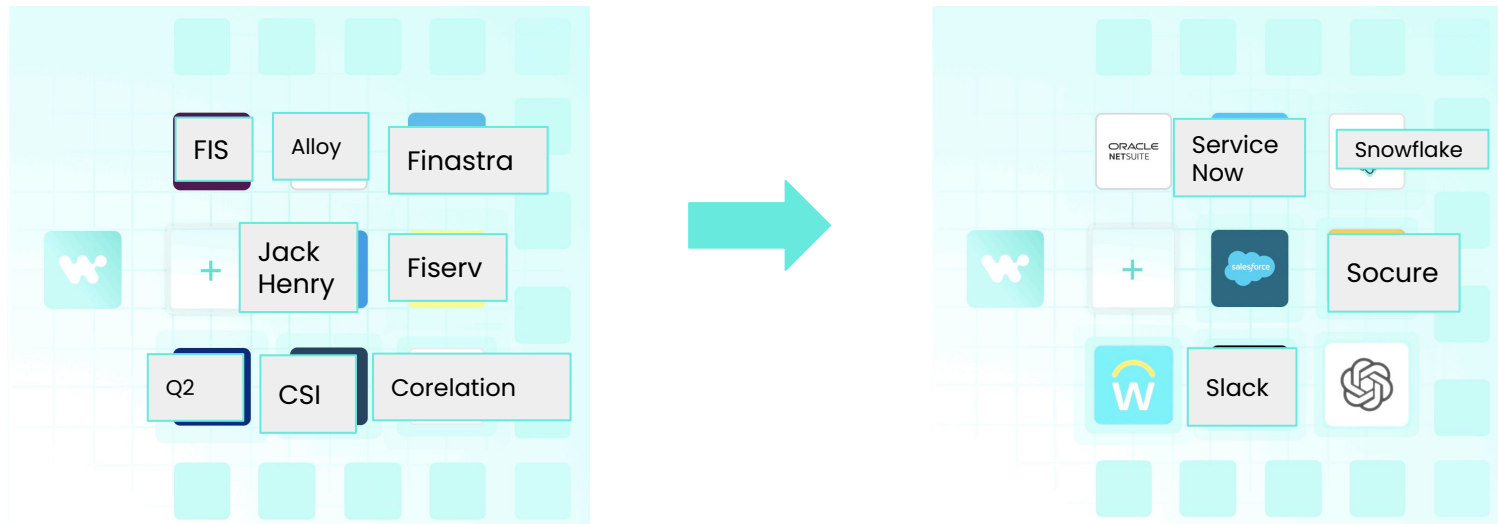
[Schedule a demo]

Hero Graphic V1

Design requested I cut down to 5 logos on each side, so I'm proposing a new layout (on the next slide)

Hero Graphic V2

The design flips from side A to side B, showing the apps which FinServ IT can connect with

II. LOGO CAROUSEL

Join the 12,000+ customers that trust Workato

[Carousel]:

- Nasdaq
- Northwestern Mutual
- Credit Karma
- Intuit
- BNY Mellon
- Bread
- Brookfield Asset Management
- Paysafe

[Featured customer tile]:

"Workato is leading the charge in MCP by creating a standard for organizations to turn their systems, data, and processes into AI-ready services with limitless innovation." - Angela Stewart, Vice President of Enterprise Solutions at Nasdaq

[Learn more]

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III. Industry data (social proof)

Why Financial Services Leaders Choose Workato

29%
of all AI value will be created by agents by 2028 (BCG)

68%
of CTOs say legacy systems are the biggest obstacle to AI adoption (EY Financial Services)

10%
of financial institutions are using AI agents at scale (Capgemini)

CTA [Learn more]

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IV. Enterprise MCP

H2: Enterprise MCP: The trust layer for AI agents in financial services

V1: 95% of Enterprise AI projects fail. In a highly protected industry, ensuring security, governance, scalability, and ease of management is critical for success.

V2: Only **6% of organizations fully trust agentic AI** with core processes—and **only 12% have the governance controls** to support them. In financial services, ensuring security, governance, scalability, and ease of management is critical.

Workato's **Enterprise MCP**, built on the #1 iPaaS, delivers:

- **Turn workflows into secure MCP servers** – Give AI agents like Claude and ChatGPT governed access to 12,000+ enterprise apps with identity and permissions
- **Enterprise-grade compliance & audit trails** – SOC 2 and GDPR compliance with role-based access for every AI action
- **Get agents working fast** – Enterprise skills accelerate processes like KYC/AML, document processing, credit checks, fraud detection, and regulatory reporting
- **Agent orchestration built in** – Coordinate AI agents across your tech stack without custom development

Workato Enterprise MCP ushers you into the agentic era—safely. [Schedule a demo]

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V. Segments

Secure, scalable agentic solutions across the financial services industry

From digital-first disruptors to traditional institutions, Workato delivers industry-specific capabilities and Enterprise MCP for secure AI agent orchestration—with the security, compliance, and governance financial services demands.

Explore use cases for Banking, Fintech and Digital-First, Wealth and Asset Management, and Insurance.

V. Segments - Banking

V1: Transform Banking with AI-Ready Orchestration

V2: Modernize Banking Infrastructure. Enable AI Agents

Modernize core banking systems while meeting customer expectations for digital-first experiences. Workato connects Jack Henry, Fiserv, FIS, and more to modern cloud applications and secure MCP servers for AI agents.

Core Banking Modernization: Connect legacy core banking systems to ERP, ETL, and CRM systems—and to 12,000+ apps and AI agents. Accelerate cloud migrations, enable real-time data synchronization, reduce integration costs, and prepare your systems for agentic AI.

Lending & Loan Origination: Deploy loan processing agents that manage application to approval. Use AI-powered document processing (IDP) for income verification, automate credit decisioning, streamline underwriting workflows, and reduce loan application abandonment.

Customer Onboarding & KYC: Automate Know Your Customer (KYC) and AML verification for faster, compliant customer onboarding. Accelerate account opening, reduce manual reviews, and maintain complete audit trails across identity verification workflows.

Customer Support: Leverage a specialized agent, Support Genie, to handle customer inquiries instantly. Provide 24/7 support for account questions, transaction disputes, and service requests while maintaining compliance standards.

Logo:BNY Mellon, Nasdaq [Schedule a demo]

V. Segments - FinTech and Digital-First

V1: Enterprise MCP and Agentic AI for Fintech

V2: Scale your platform faster. Build and orchestrate AI agents securely.

Workato helps you launch products faster, scale globally, and win new credit buyers. Rapidly develop and deploy AI agents through Enterprise MCP to automate complex workflows across your entire fintech stack.

Use Case Tiles:

1. Instant Customer Onboarding Reduce onboarding from days to minutes. Automate KYC/AML compliance checks, identity verification, and account provisioning across multiple systems—delivering the instant account creation customers expect while maintaining regulatory compliance

2. Revenue Operations at Scale Overcome manual errors in campaign creation and native CRM limitations. Automate marketing execution and Salesforce license optimization to target first-time credit buyers and expand acquisition channels.

3. Embedded Payments & Integration Accelerate merchant onboarding and payment processing. Build integration capabilities directly into your platform without custom development—enabling seamless connectivity for your customers' financial workflows.

Customer Example: Learn how Bread Financial reduced customer onboarding time by 84%, eliminating 30 minutes of manual data entry per customer.

Logos: Credit Karma, Intuit, Bread, Paysafe [Schedule a demo]

V. Segments - Wealth and Asset Management

V1: The Orchestration Layer for Wealth & Asset Management

V2: Unify Wealth Management Operations. Then Put Agents to Work

Deliver personalized client experiences while managing complex portfolios across multiple custodians. Workato orchestrates data and AI agents across portfolio management systems, CRMs, and compliance platforms for real-time insights and automated reporting.

Investment Operations & Research: Deploy specialized research agents to synthesize complex reports and optimize analysis workflows. Automate portfolio rebalancing, trade order execution, and real-time position reconciliation across custodians and administrators.

Client Onboarding & Service: Leverage Workato's Support Genie agent to reduce handle time and improve CSAT. Streamline KYC/AML documentation with AI-powered processing, accelerate client onboarding with automated compliance checks, and synchronize data between CRM and portfolio management systems.

Regulatory Reporting & Compliance: Automate fund accounting, draft regulatory filings, Form ADV, and compliance monitoring. Ensure real-time data accuracy across all regulatory submissions with enterprise-grade audit trails.

Logo: Brookfield Asset Management

[Schedule a demo]

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V. Segments - Insurance

V1: Orchestrate Insurance Operations for the AI Era

<mark>**V2: Modernize Insurance Operations and Enable Agentic AI**</mark>

Process claims faster, underwrite policies more accurately, and meet evolving regulatory requirements—all while managing legacy policy administration systems. Workato connects core insurance platforms to modern applications, and enables secure AI agents via Enterprise MCP.

Claims Processing & Automation: Automate FNOL intake, claims routing, and fraud detection. Use AI-powered document processing (IDP) for claims documents, medical bills, and repair estimates to accelerate resolution and improve customer satisfaction.

Policy Administration & Underwriting: Streamline quote-to-bind and policy renewal workflows. Connect policy administration systems to rating engines, CRMs, and agency management platforms for real-time data synchronization and faster underwriting decisions.

Broker & Agent Ecosystem Enablement: Empower insurance brokers and agents to pull data from their clients' HR, payroll, and financial systems directly into your platform for quoting, underwriting, and policy management.

Customer example: Learn how Helia accelerated their AI-first strategy by automating invoice generation and approval, achieving 4x more developer availability and 35% time savings.

Logos: Northwestern Mutual, Helia [Schedule a demo]

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VI. Featured Partner

Featured Partner: API People

Workato and API people help financial institutions modernize their technology foundations. Unlock pre-built connections to **Fiserv, FIS, and Jack Henry Silverlake, CIF2020, Symitar, and Synergy.**

[Schedule a demo]

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VII. Case Studies

Explore financial services customer success stories

Case Studies

1. **Altus Financial** - Top Australian accounting firm uses enterprise automation to ensure data integrity - Link (less than 1 year old)
2. **Paysafe** - Extended Zendesk's capabilities with Workato for agile workflows - Link (4 years old)
3. **William Buck** - Leverages Workato to be more competitive - Link (less than 1 year old)
4. **IC-Verzekeringen** - Used automation to accelerate migration from on-premise to cloud platforms - Link

Videos

5. **Fundbox** - Improved sales productivity by 20% and efficiently scaled the business by automating data flows - Link (4 years old)
6. **EQT** - Future proofs portfolio companies with a distinctive value creation approach - Link (4 years old)
7. **MX** - Applies iterative innovation to build data-driven products for banks and finance companies - Link (4 years old)
8. **Bread Financial** - Reduces customer onboarding by 84% to accelerate growth - Link (3 years old)

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VII. Insights

Explore financial services industry insights

a. From Legacy Banking to Agentic Advantage: A Conversation with Steve Scott, CEO of API People

How community banks are modernizing their core systems, unlocking AI readiness, and preparing for the agentic era

b. A Guide to Banking as a Service (BaaS)

Ever wonder how a retail app launches a debit card or how a marketplace pays sellers instantly, without becoming a bank?

c. AI-Ready Banking Starts with Orchestration: Laying the Foundation for Agentic AI

From fraud detection to personalized financial advice, financial institutions (FIs) are betting big on artificial intelligence to streamline operations and unlock new growth.

d. How Banks and Credit Unions Modernize with Cloud-Native Integration and Automation

Banks and credit unions have faced limitations with legacy banking cores and point-to-point integrations to run their operations for decades.

e. How Banks and Credit Unions Achieve Digital Transformation with Workato

Banks and credit unions stand at a crossroads. Their legacy core systems, often running on-premises, create silos

Questions

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Questions

1. Adding content to direct viewers to function-specific use cases?
2. Nasdaq as banking or wealth & asset management?
3. Emphasis of MCP in overall messaging?

Next Steps

Next Steps

1. Design kickoff (in progress) - copy changes can be made up to ~3 days before go-live
2. SEO pass from Brad (done)
3. Final pass from Charles Colt, Steve Scott (API people) (done)
4. Feedback from Craig (done)

Retail Industry

Competitor Overview: Segments and Use Cases

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Competitor Overview: UiPath

- Separate manufacturing and retail pages, but say "**UiPath Solutions for Manufacturing and Retail**" on Retail. Emphasizing **4 key use cases for Inventory management: Rebuy, Replenishment, Markdown, Promotions**.
- "Transform critical retail processes, including **inventory management, supply planning, and return processing** with agentic automation."
- "**Prebuilt agentic solutions** bring AI-powered insights to your **merchandising, pricing, and inventory processes**, enabling faster response to market shifts. By connecting disparate systems and automating manual tasks, these solutions help you stay competitive while maximizing profitability across your operations."

Inventory AI: Right stock, right place, right time.

Rebuy	Replenishment	Markdown	Promotions

Competitor Overview: Mulesoft

- "Connect with your customers and accelerate innovation. Understand your customers, reduce costs, and keep loyalty growing."
- **Four core value props:** Deliver consistent commerce across every channel, Resolve issues faster with AI, Offer smarter service in real time, Support your store teams.

Use AI to streamline operations and elevate every customer touchpoint.

Real-time inventory
Get a clear view of inventory across stores and warehouses by breaking down system silos.

Order Management
Gain end-to-end order visibility to boost efficiency and deliver better customer experiences.

Loyalty Management
Bring together loyalty data across parent and sub-brands to drive repeat purchases and long-term growth.

Return Management
Automate returns across systems to provide real-time updates and a smooth experience for customers.

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Competitor Overview: Boomi

- "Turn Omnichannel Into Your Growth Engine"
- **3 core value props:** Win over shoppers across touchpoints, advance supply chain agility, and accelerate brand expansion with the one modern platform for agentic automation

Vendor & Logistics Onboarding

Enable self-service portals and automate document exchange for EDI and non-EDI partners to speed time-to-shelf and delivery.

Unified Commerce

Connect ecommerce, POS, ERP, and fulfillment systems to unify data, streamline operations, and enable real-time visibility across every channel.

Order Fulfillment

Automate order fulfillment, enable buy-online-pick-up-in-store (BOPIS) and ship-from-store, and keep shoppers informed in real time.

Inventory Management

Ensure accurate, real-time inventory across warehouses, stores, and online channels and automatically replenish stock using insights to prevent out-of-stocks.

Brand Acquisition

Connect ERP, CRM, HR, and supply chain systems to onboard new brands quickly and accelerate time-to-value.

Customer Loyalty & Personalization

Unify customer data to deliver tailored offers, dynamic pricing, and rewards that drive repeat purchases.

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Competitor Overview: Accenture & Deloitte

- Heavy on thought leadership/insights (blogs, reports, whitepapers) and featured case studies

Accenture Segments:

- Apparel, luxury & accessories
- Grocery
- Mass merchandise & department stores
- Home improvement & furnishings
- Drugstore, health & beauty
- Quick service restaurants, convenience & fuel
- Consumer electronics
- Off-price/discounts
- Specialty retail

Deloitte Segments: Retail is nested under "Consumer" segment that also includes Auto, Consumer Products, and Transportation, Hospitality & Services

- Retail, Wholesale & Distribution — "We advise companies by identifying, understanding, and responding to changing trends, business models, and opportunities in the rapidly evolving retail landscape. Our integrated teams can serve you as you make strategic decisions that can help you thrive in this dynamic market environment." — also a strong sustainability/ESG focus in messaging

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