



ACCELERATING OUTCOMES WITH BUSINESS OBJECTIVE-BASED CONSULTING

Financial Services Example: Demonstrating how Hasura streamlines compliance, detects fraud, accelerates innovation, and elevates customer experiences

OBJECTIVES

Select 10 impact **AI-driven** use case categories based on industry and field experience



Accelerate Solution Delivery

Leverage pre-built accelerators and infrastructure to rapidly deploy integrations and solution enablers

NOT end-to-end. Integration focused. Enablement focused

Accelerators are reusable, open-source professional services code, not products.



Increase Deal Revenue

Reduce time-to-close and deliver higher value solutions



Reduce Time-to-Close

Streamline the sales process and accelerate deal cycles



Knowledge Transfer

Facilitate knowledge sharing and training to empower clients for successful use of PromptQL

Empower clients with accelerated solutions and effective knowledge transfer. With our product expertise and open-source accelerators, Hasura delivers solutions 2-3X faster than traditional approaches, reducing time-to-close and significantly increasing deal revenue.

FINANCIAL SERVICES OFFERINGS FOR PROFESSIONAL SERVICES

Every one of these opportunities can lead with AI! Every one of these opportunities is a PS opportunity! Duplicate and leverage for other industries!



Prioritized based on immediate revenue potential, ease of delivery, and client urgency. Though prioritized, each use case can be delivered independently.

#1: AI-POWERED AUTOMATED CONTROLS MONITORING, CONTINUOUS COMPLIANCE, AND DATA GOVERNANCE

Hasura why? Addresses immediate regulatory needs; substantial cost savings; high urgency and clear ROI shorten approval cycles.



AI-Driven Monitoring of Internal Controls

Data agents continuously monitor internal controls to proactively identify exceptions



Compliance Exception Detection

Data agents automatically detect compliance violations and generate alerts



Intelligent Data Governance Oversight

Centralized data lineage, metadata management, and data quality monitoring using data agents

Customer Why?

AI enhanced controls and compliance monitoring solution enables significant cost savings, reduced audit failures, and ensures ongoing compliance readiness.

Accelerators

- Audit & Security Plugins · Client JDBC/ODBC connectors
- Data Validation Plugin · Schema Time Travel Plugin Data Catalog Connector SDK

#2: AI- ENHANCED FRAUD DETECTION AND NEAR REAL-TIME RESPONSE AUTOMATION

Hasura why? Significant financial loss prevention with easily demonstrable ROI; quicker executive buy-in and funding.



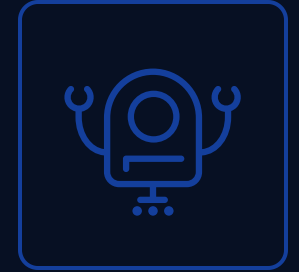
Near real-time AI fraud pattern analysis

Data agents detect fraudulent activities by analyzing transaction data and behavioral patterns



AI Anomaly detection

Data agents identify unusual patterns that deviate from the norm to recognize irregularities that may indicate risks or opportunities.



Intelligent transaction monitoring and remediation

Data agents continuously analyze transactions in near real time to detect and address suspicious activities

Customer Why?

Reduced fraudulent transactions protecting the bank's assets and customer trust.

Accelerators

· Anomaly Detection Plugin · File / Web Connectors · Audit & Security Plugins

#3: AI-POWERED FDX & OPEN BANKING

Hasura why? Direct revenue-generation potential and competitive necessity; clear North American (FDX) and global relevance simplify procurement.



Rapid deployment of AI-monitored open finance APIs
Accelerate compliance with open banking regulations and enhances customer experiences



Integration of third-party financial data via FDX standards
Enhance financial aggregation, enhance customer financial insights and offer more personalized financial services



AI-driven personalized marketing and customer analytics
Leverages aggregated financial data to create comprehensive customer financial profiles. Analyze transaction patterns, spending behaviors, and financial history in real time, deliver hyper-personalized marketing strategies, targeted retention programs, and data-driven product recommendations

Customer Why?

Rapid compliance with open banking standards. Launch secure open banking APIs within weeks, accelerate revenue streams, AI-monitored compliance, and deliver hyper-personalized experiences

Accelerators

· OB/FDX Plugins · File / Web Connectors · Client JDBC/ODBC connectors

#4: AI- ENHANCED REAL-TIME CUSTOMER 360 IMPLEMENTATION

Hasura why? Strong alignment with revenue growth; budgets typically allocated quickly; short-medium sales cycles.



Unified real-time view of customer data across multiple products

Consolidate and analyze customer interactions across banking, investments, loans, and other services instantly using data agents



AI-Powered personalized marketing, retention programs

Enhance customer loyalty, reduce churn, and boost lifetime value through customized experiences and targeted incentives

Customer Why?

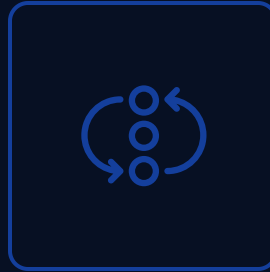
Reduce customer attrition due to fragmented customer data.
Provided unified insights, boost customer retention and increasing cross-sell revenue.

Accelerators

· Data Transformation Plugins · Web/File Connector · Client ODBC/JDBC connectors · Data Validation Plugin

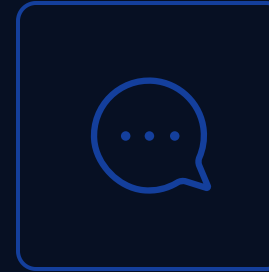
#5: AI-ENABLED DYNAMIC REGULATORY REPORTING

Hasura why? Substantial cost savings; significant reduction of common and expensive regulatory penalties; high executive prioritization.



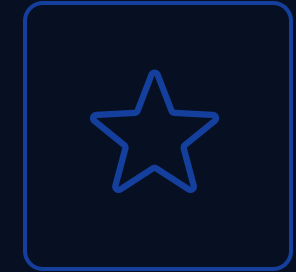
Regulatory change monitoring

AI continuously tracks updates from regulatory bodies, and keeps compliance teams informed



Regulator inquiry responses

Handle regulatory inquiries by using AI to automatically analyze questions, retrieve relevant compliance data, and generate accurate responses



Report review and quality analysis

Ensure regulatory reports are accurate, complete, and unusual deviations from historical norms are flagged for review using data agents

Customer Why?

Reduce regulatory fines due to late or inaccurate reporting.
Reduce cost to implement report generation. Reduce compliance costs.

Accelerators

· Data Transformation Plugins · Audit Plugins · JDBC/ODBC Client Connectors · Schema Time Travel Plugin · Anomaly Detection Plugin

#6: AI-ACCELERATED CREDIT RISK DECISIONING

Hasura why? AI predictive analytics accelerate loan decisions, clearly driving higher loan origination volumes, profitability, and competitive advantage, resulting in executive prioritization.



Real-time AI-driven credit data aggregation

Continuously collect, process, and analyze credit data from multiple sources to provide financial profiles that are accurate, complete and free from inconsistencies



Predictive risk scoring

Analyze aggregated credit data using AI and machine learning to assess the likelihood of default, fraud, or financial risk.



Intelligent loan approval automation

Leverage AI-driven credit risk analysis, predictive scoring, and real-time data aggregation to automate decision-making with AI, expedite approvals, reduce manual processing errors, and enhance risk assessment accuracy

Customer Why?

Accelerate credit approval processes to improve competitive edge. Expedite loan approvals driving higher loan origination volumes and profitability.

Accelerators

· Data Transformation Plugins · Client Connectors (JDBC/ODBC) · File & Web Connectors · Data Validation Plugin

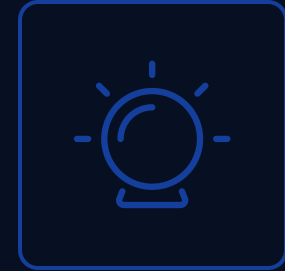
#7: AI-POWERED CUSTOMER SERVICE AUTOMATION AND INSIGHTS

Hasura why? Clear operational cost reduction; note, multiple integrations and stakeholders moderately lengthen sales cycle.



Customer self-service

AI-driven chabots enable customers to efficiently resolve inquiries, access account information, and perform transactions, like balance checks, fund transfers, and fraud alerts.



Call-center agent assistant

Automate routine tasks. Enhance sentiment analysis, improving personalized customer interactions. Improve resolution speed, improve customer satisfaction, and reduce operational costs while maintaining high service quality

Customer Why?

Reduce operational costs from high-volume customer inquiries. Chatbot automation improves response accuracy, reduces call volumes, and significantly enhances customer satisfaction.

Accelerators

- Custom Data Source Connectors · Security Plugins · Client Connectors (Python/JDBC/ODBC)

#8: AI-ENABLED OPERATIONAL RISK MANAGEMENT AUTOMATION

Hasura why? Strategic value significant; be aware, complexity and multiple stakeholders moderately lengthen sales cycle.



AI-powered real-time event monitoring

Continuously track operational events, transactions, and anomalies in real-time. Detect process inefficiencies or compliance risks and flag for follow-up.



Proactive AI risk alerting

Aggregate internal monitoring data and apply AI-driven analysis to determine who needs to be alerted, when to send alerts, and how to structure communications for effective risk mitigation.



Predictive risk analytics

Use historical operational data and AI models to forecast potential failures, system disruptions, or compliance risks. Enabling optimized internal decision-making

Customer Why?

Accelerate identification of operational risks. Automate real-time monitoring and proactive alerts, decreasing operational incidents and minimize financial exposure.

Accelerators

· Audit Plugins · Data Transformation Plugins · Client JDBC/ODBC Connectors · Anomaly Detection Plugin

#9: AI- PERSONALIZED WEALTH MANAGEMENT

Hasura why? Revenue upside clear; be aware complex integration and stakeholder alignment lengthen sales cycle.



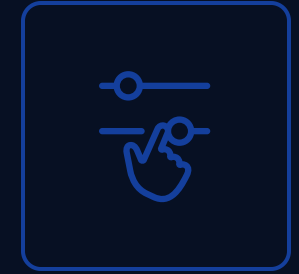
Personalized AI-driven advisory services

Provide tailored financial guidance based on an investor's portfolio, risk tolerance, and financial goals. Analyze market trends, transaction history, and external financial data (via FDX or open banking standards) to create customized investment strategies.



Real-time AI investment insights

Deliver instant market analysis and predictive insights, enabling investors and advisors to make informed decisions quickly. Leverage sentiment analysis, predictive modeling, and real-time data aggregation to track investment opportunities.



Intelligent portfolio management integration

Automate portfolio balancing, asset allocation, and risk assessment across different investment classes. Optimize portfolios by adjusting exposure based on market conditions, investor preferences, and external financial data.

Customer Why?

Differentiate advisory services. Provide real-time, personalized investment insights, increase client portfolio engagement and growing assets under management.

Accelerators

- Data Transformation Plugins · Custom Data Connectors (PDF, DOCX, HTML tables)
- Client Connectors (Python/JDBC/ODBC)

#10: AI-DRIVEN PRODUCT INNOVATION LAB

Hasura why? AI innovation significantly accelerates product cycles, facilitating rapid market entry and strategic revenue growth.



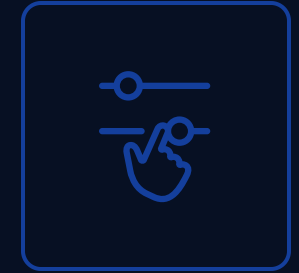
Automated Market Research & Trend Analysis

Continuously scan financial markets, customer behaviors, and emerging trends to identify new product opportunities.



AI-Powered Product Prototyping & Testing

Automates the design, simulation, and testing of financial products, reducing development cycles.



Automated Financial Model Simulation & Stress Testing

Model economic scenarios, market fluctuations, and financial stress conditions to test new product viability. Predict risk exposure, optimize pricing strategies, and assess product performance under different market conditions.

Customer Why?

Reduce product development cycles, accelerate new market entries and generate incremental revenue.

Accelerators

· Data Transformation Plugins · Custom Data Connectors (PDF, DOCX, HTML tables) · Client Connectors (Python/JDBC/ODBC)

INVENTORY OF ACCELERATORS

Every accelerator provides AI-enablement

- Audit & Security Plugins

Real-time monitoring and compliance detection

- Anomaly Detection Plugin

AI-driven fraud and risk analytics

- Data Validation Plugin

Automated data quality assurance

- Data Transformation Plugins

Self-describing transformation capabilities with integrated data lineage reporting

- Schema Time Travel Plugin

Version control and reporting

- Data Catalog Connector SDK

Facilitates integration with enterprise data catalogs

- Client JDBC/ODBC Connectors

Universal client connectivity

- File & Web Connectors

Seamless integration with external data sources

- Custom Data Source Connectors

Tailored integration with specialized data formats (PDF, DOCX, HTML)

- Open Banking (OB) / Financial Data Exchange (FDX) Plugins

Rapid integration with standardized financial APIs

SUMMARY

- **Complementary**

Enhances credibility and extends the value of DART by providing industry-specific accelerators and AI-enabled solutions

- **Flexible**

Can also be structured as a separate revenue-generating professional services offering

- **Efficient**

Low-cost repositioning of existing professional services offerings

- **Fast Sales Cycles**

Increased velocity in deal closure by demonstrating higher ROI to clients through rapid delivery

- **More Revenue/Deal**

Higher deal values through targeted, AI-enabled professional services

- **Scalable**

Industry-specific accelerators facilitate rapid and cost-effective marketing across sectors

NEXT STEPS



Refine Messaging

Align service offering content with key business outcomes



Develop Targeted Collateral

Create concise sales enablement materials highlighting unique value



Identify Quick Wins

Deploy targeted solutions to generate early success stories

With a focused effort on repositioning content, developing sales-ready collateral, and securing initial quick wins, we can build momentum and expand the impact of our professional services offering.