

build your winning AI planning team

The Key Players You Need to Succeed



AI in Financial Services: Why You Should Embrace It

AI is enabling financial institutions to better deliver service, strengthen relationships, and build trust, and your financial institution can't afford to fall behind.

In fact, 91% of financial services companies are already assessing or using AI in production.¹ But building an AI program that aligns with your organization's mission requires careful planning – and it starts with pulling the right people into the conversation.

who should be involved in AI planning?



Executive Leadership

Your leadership team shapes the strategic goals of your AI program, ensuring it aligns with your mission and values.



Compliance

With AI regulations constantly evolving, your compliance team ensures your organization stays on top of rules and mitigates risks.



Risk Management

Risk experts help identify potential challenges and create policies to mitigate them, ensuring your AI initiatives are secure and responsible.



Information Security

Protecting data is crucial. Your ISO will safeguard privacy, proprietary code, and sensitive information from AI-related risks.



Legal

AI regulations change quickly. Your legal team helps protect your institution from legal exposure and liability.



HR

AI can transform your workforce. HR will shape your talent strategy and assess AI's impact on employee roles and resources.



IT/Technology

IT leaders evaluate data sources, infrastructure needs, and AI use cases to ensure technological alignment with your goals.



Marketing

Your marketing team will communicate AI changes to your stakeholders and advocates for accountholders, ensuring an enhanced experience.



Finance

Your finance team assesses the cost-benefit of AI and monitors compliance with financial regulations and SEC requirements.



Relationship Building

Keeping your accountholders' needs front and center ensures that AI supports, rather than disrupts, their experience.



The Power of a Collaborative Approach

Involving stakeholders across your organization ensures that your AI policy is robust and well-rounded. This collaborative effort helps balance innovation with risk, while tapping into diverse expertise to build a strategy that works for your bank or credit union.

expand your knowledge

eBook

[Getting Started in AI: A Guide for Community and Regional Banks and Credit Unions](#)

Article

[AI in Financial Services: 10 Key Questions to Consider Before Implementing AI](#)

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