



Workforce Reinvention Blueprint

Financial Services Industry

How AI and Automation will Transform the Workforce Based on ReeJig's Proprietary Work Ontology™ Intelligence

How AI is Reinventing the Financial Services Industry

The Financial Services Industry is a colossal force in the global economy, valued at approximately USD 22 trillion in 2023. By 2028, it is forecasted to grow to USD 28 trillion.

Top 3 Concerns Facing Financial Services CEOs in 2025

1. Talent Shortages and Cost Management
2. Regulatory and Compliance Burden
3. Technology Readiness and AI Integration

Focus Area 1: Workforce Shifts

Projected Workforce Shifts in 2025 and Beyond

Where AI and Automation Will Drive Operational Effectiveness

1

Increase in Regulatory Compliance Automation

Regulatory compliance is increasingly being automated through RegTech solutions.

2

Routine Customer Interactions will be Automated

AI-driven CRM systems will automate routine client interactions, lead tracking, and initial inquiries.

3

AI will Boost Data Analysis Efficiency

Data analysis, predictive modeling, and financial forecasting are being automated by AI platforms.

AI is expected to **improve operational efficiency in risk management by 40-50%**.

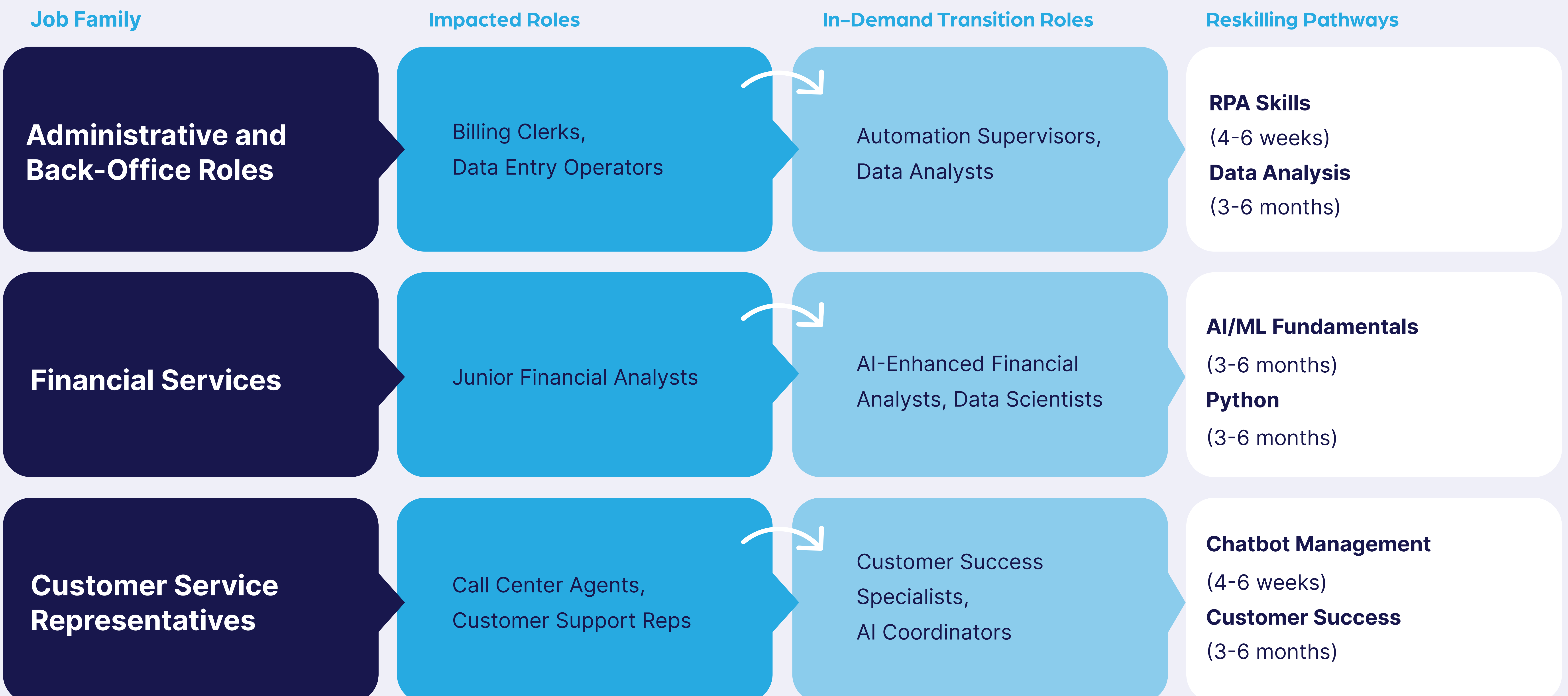
AI can lead to **30-40% improvements in customer service efficiency**, primarily through chatbots handling basic tasks, automated follow-ups, and AI-driven personalized marketing.

AI is expected to bring about a **35-45% improvement in data analysis efficiency**, enabling firms to process larger datasets in less time and with fewer errors.

Focus Area 2: Roles Impacted by AI

Key Roles Impacted and Reskilling Pathways for 2025

How Impacted Roles Can Transition to In-Demand Roles



Focus Area 3: Driving Operational Effectiveness

2025 AI Strategies to Boost Operational Effectiveness

Prioritized Roles for AI Transformation based on AI Potential Index, Operational Efficiency Index & Time to Benefit Realization

1

Risk Management and Compliance Officers

Compliance automation is crucial due to increasing regulatory demands.

With a high AIPI of 2.4 and OEI of 84%, automating compliance tasks offers the most significant AI impact. Financial institutions should prioritize AI in compliance to meet growing regulatory demands.



AI Potential Index (AIPI) Score: 2.4

Breakdown: Potential Automation Proportion: 60%, AI Maturity/Risk Adjustment: 0.8, Current Automation Proportion: 20%



Operational Efficiency Index (OEI) Score: 84%

Breakdown: Time Savings: 40%, Cost Savings: 30%, Process Improvement Factor: 1.2



Time to Benefit Realization: Short-Term (6-18 months)

Initial benefits in 6-12 months, full impact in 12-18 months.

2

Customer Relationship Managers

AI can significantly enhance routine customer interactions while improving satisfaction.

With an AIPI of 1.7 and OEI of 63%, boosts efficiency by handling routine interactions, allowing human agents to focus on high-value clients. Adopt AI to improve customer satisfaction and reduce costs.



AI Potential Index (AIPI) Score: 1.7

Breakdown: Potential Automation Proportion: 50%, AI Maturity/Risk Adjustment: 0.85, Current Automation Proportion: 25%



Operational Efficiency Index (OEI) Score: 63%

Breakdown: Time Savings: 30%, Cost Savings: 25%, Process Improvement Factor: 1.15



Time to Benefit Realization: Short-Term

Noticeable benefits in 3-6 months, full impact in 12-18 months.