

FREE WEBINAR



AI in Bank Operations

From Exploration to Execution

Presented By | Meredith Rousseau, Frank Ferriola, Heang Chan, and Shawn Main

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1:00 pm EST

Presenters



Meredith Rousseau

SVP, Banking & Financial Services



Meredith is a payments and deposit operations leader with 25+ years of experience in program management, process improvement and technology. She drives performance improvement by implementing innovative, scalable solutions and leading enterprise-wide transformation.



Frank Ferriola

SVP, Banking & Financial Services



Frank is a Senior Vice President in SolomonEdwards' Banking & Financial Services practice with 30+ years of experience across banking operations and technology. He partners with institutions to design technology strategies that improve efficiency and deliver seamless customer and employee experiences.



Heang Chan

CEO, Co-Founder



Heang Chan is CEO and Co-founder of Prelim, a Silicon Valley technology company transforming how financial institutions onboard accounts. Drawing from over two decades of experience at Goldman Sachs, Bank of America, and Wells Fargo, Heang is passionate about making banking more accessible and customer-centric through technology and design.



Shawn Main

EVP, Chief Architect



Shawn Main serves as Executive Vice President and Chief Business Architect at Vantage Bank, where he leads the Shared Services division. In this role, Shawn ensures strategic alignment between business and technology to enhance customer experiences and drive operational efficiency.



AI Adoption in Banking at a Glance

Key statistics across global financial institutions, 2024–2025

92%

Banks with active AI deployment

At least one core function

+133%

Scale adoption

30% (2023) → 70% (2025)

\$73B

Projected AI spend in 2025

+17% YoY increase

30.6%

AI market CAGR to 2030

\$39.1B → \$194.3B

75%

of banks with >\$100B assets fully integrating AI by 2025

60%

efficiency gains possible with specialist AI teams (BCG)

\$2T

AI contribution to global banking economy by 2030

38%

of AI projects meet or exceed ROI expectations

The Reality of AI in Bank Operations Today



How Banks Are Thinking About AI Today

Banks are approaching AI cautiously and pragmatically, focusing on near-term operational improvement rather than large-scale transformation. Most initiatives are tied to specific pain points, not enterprise-wide reinvention.



Where Banks Are Actually Starting

Early efforts are concentrated in defined workflows such as onboarding, fraud review, exception handling, document processing, and QC, focusing on areas with clear volumes, rules, and measurable outcomes.



AI Assistance Vs. Automation

Most successful use cases today support human decision-making rather than replace it. AI is being used to surface insights, flag risks, or accelerate reviews, while humans retain accountability.

LIVE DEMO

At the end of the webinar, we will showcase a **Live demo** of a successful use case.



Expectation Vs. Reality

While AI is often positioned as transformational, real value tends to appear incrementally. Banks are learning that operational readiness, data quality, and governance maturity matter more than model sophistication.





Live Poll 1

How is your bank
currently approaching AI?



Barriers & 2025–2026 Outlook

Key Barriers to Adoption

68% of CTOs cite legacy systems as #1 obstacle (EY)

65% of FIs experience implementation delays avg. 14 months

87% of banks cite data management as biggest AI hurdle

38% of AI projects meet or exceed ROI expectations (BCG)

29% of FIs report AI has delivered meaningful cost savings

14% of agentic AI initiatives at full-scale deployment

2025 – 2026 Outlook

\$143.6B Global AI in banking market by 2030 (30.6% CAGR)

>70% Financial institutions using AI at scale by late 2025

70% of FIs exploring agentic AI for autonomous workflows

EU AI Act High-risk AI (credit, AML) compliance required Aug 2026

\$73B Bank AI tech spend in 2025, +17% YoY

\$2T AI contribution to global banking economy by 2030



What Slows AI Adoption in Practice



Unclear Ownership and Decision Latency

AI initiatives often span operations, technology, risk, and compliance — slowing decisions when accountability is diffused or ownership is unclear across teams.



Competing Priorities Inside The Bank

Regulatory change, core system modernization, staffing constraints, and day-to-day operational demands frequently take precedence over innovation initiatives.



Risk and Compliance Uncertainty

Unclear regulatory expectations and concerns around model risk, explainability, and data use often delay or limit deployment — even when business value is clear.



Legacy Processes and Infrastructure

Fragmented processes and legacy tech make it hard to embed AI effectively until you've tackled workflow design, data quality, and integration.

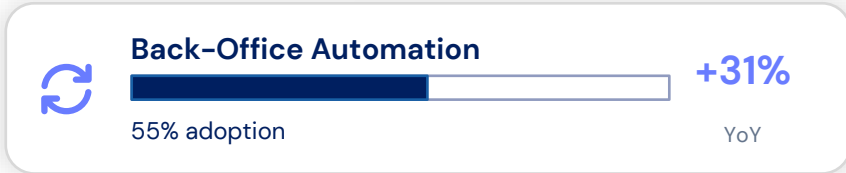
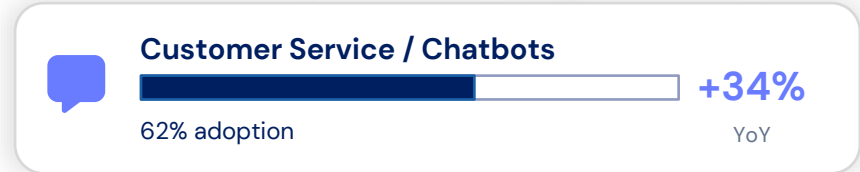
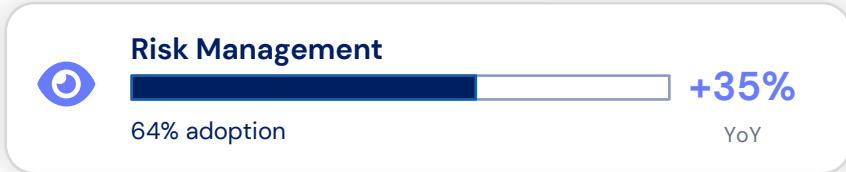
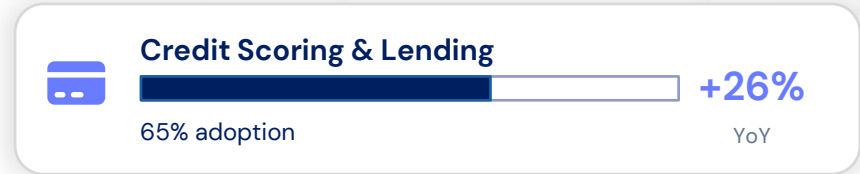
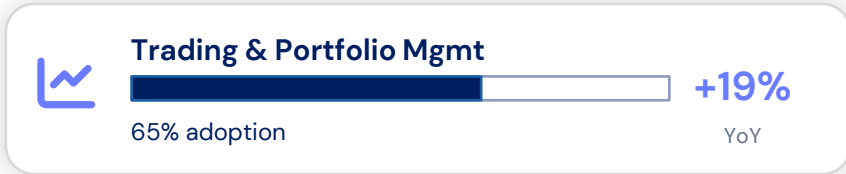


Live Poll 2

What use cases are you considering for AI within your organization?



AI Use Cases: Adoption & YoY Growth



Practical AI Enablement Within Banking Workflows



Embed AI Where Work Actually Happens

The most effective AI solutions fit naturally into existing workflows rather than forcing teams to adopt entirely new processes and help identify high-value process and data quality improvements that it can adopt and adapt along the way.



Keep Humans Accountable

Human-in-the-loop designs preserve judgment, support explainability, and align with regulatory expectations, especially for customer-impacting decisions.



Start Narrow, Then Expand

Successful programs typically begin with smaller, well-scoped pilots, refine based on user feedback, and scale once value and controls are proven.



Evaluate Readiness and Impact

Operational leaders focus on cycle time, quality, exception rates, auditability, and adoption, not just technical performance.



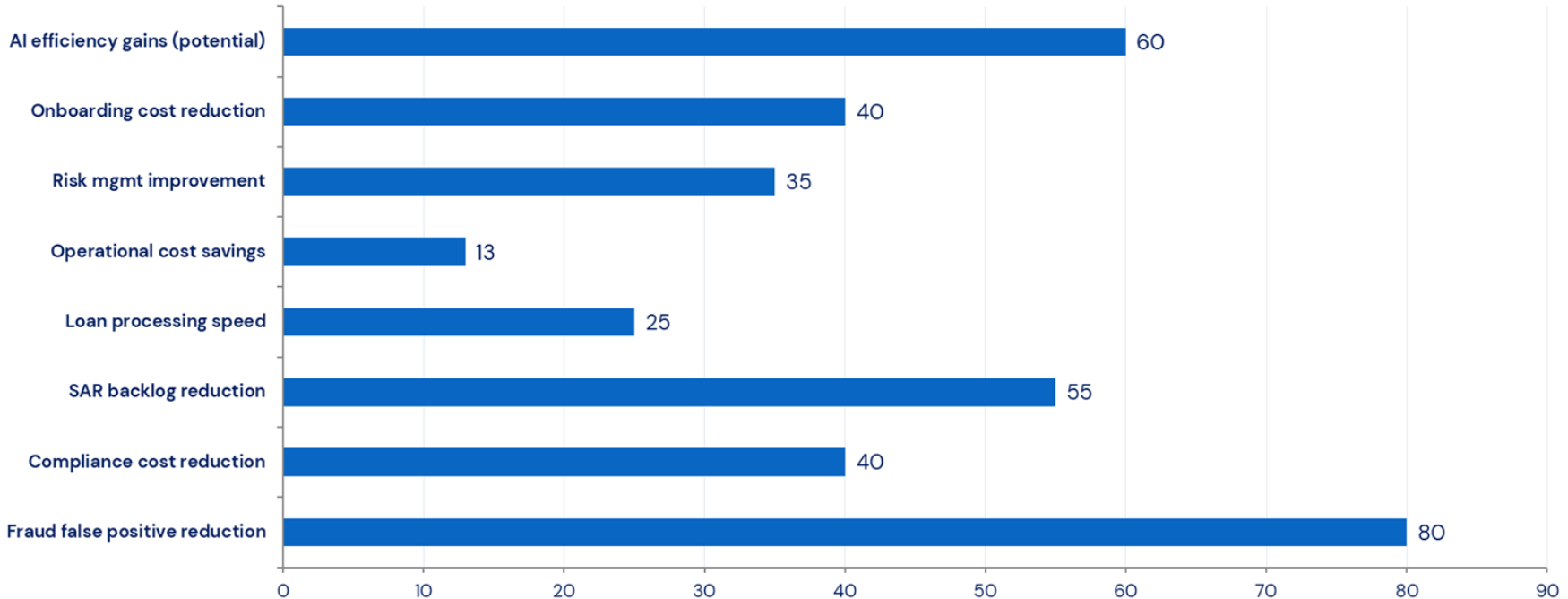
Live Poll 3

What operational challenge would you most want AI to help address?



Operational Efficiency Impact

Measured outcomes from AI deployment across banking operations





Live Demo



Thank You



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