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Transform: reimagining customer operations

Part 1 of 4

Scaling AI securely in financial services ·
20 October 2026

Jeremy Brown	Principal Solution Engineer	your host
Tom Golebiowski	Senior Solution Engineer	your presenter

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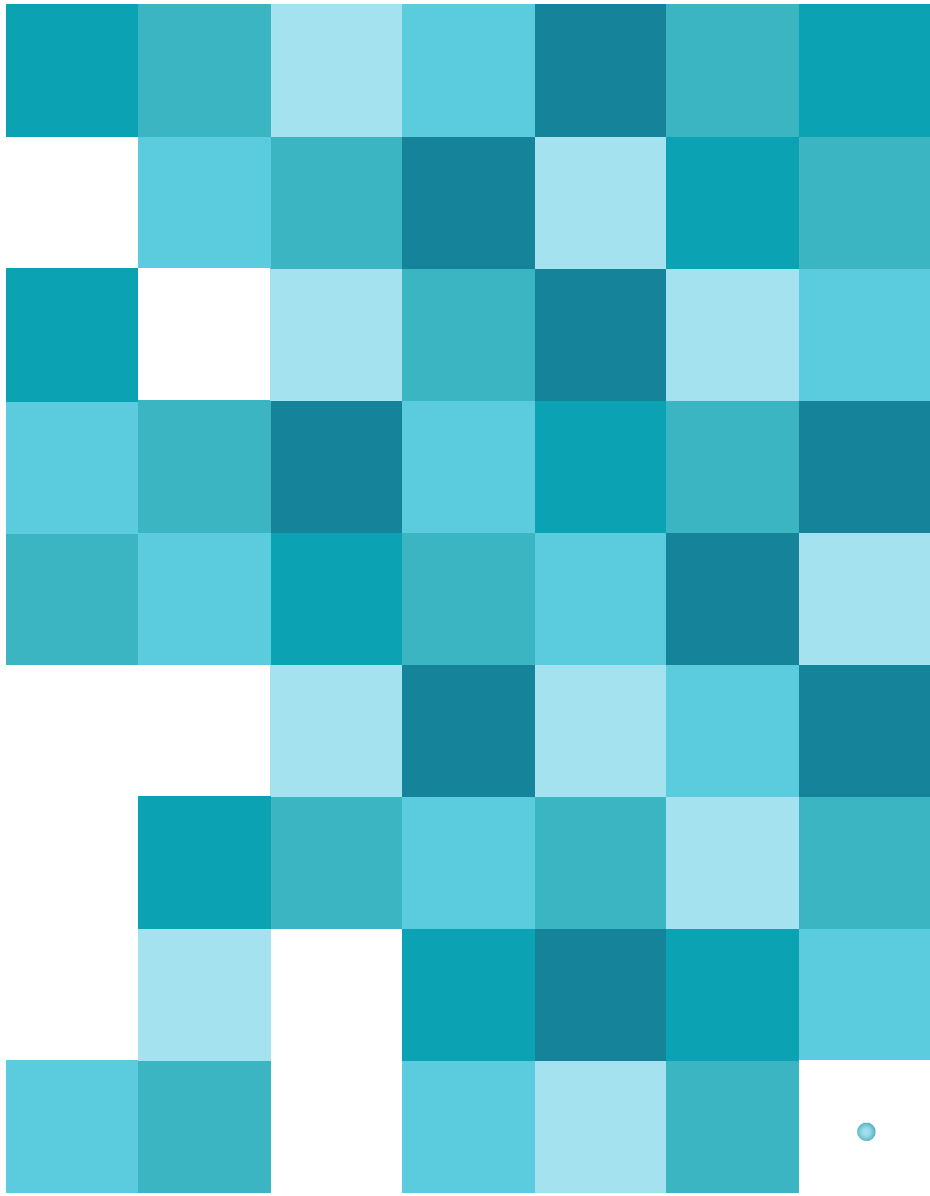

One series, four steps to scaling AI with confidence

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Transform

- Reimagining customer operations
- 20 October



Protect

- Modernising financial crime operations
- 3 November



Assure

- Transforming controls testing
- 17 November



Govern

- Building trusted AI foundations
- 1 December

Safe Harbor

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Why I’m talking about this

Tom Golebiowski, Senior Solution Engineer, BFSI

- 4 years of working across customers portfolio of ~20 insurers, banks and regulated organisations
- Responsible for helping customers deploy Agentic Automation solutions with a grounding in deterministic RPA
- Focus on projects in customer operations



Customers expect more than journeys deliver

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62%

of banking customers would switch banks for a better digital experience

Baringa, 2025

68%

of banking executives say their technology limits how well they serve customers

Baringa, 2025

10%

of financial institutions have scaled AI agents, while 80% are in ideation or pilot

Capgemini, 2026

Where customer journeys get stuck

Manual hand-offs

The customer waits while work queues.

- Re-keyed between front office, ops and compliance
- Status lives in inboxes and spreadsheets

Disconnected systems

No single view of the customer.

- CRM, documents, core systems and channels apart
- Customers asked for the same information twice

Fragmented processes

Bots automate tasks, not journeys.

- Each automation solves one step in isolation
- Processes not documented or dynamically understood

From automation to business orchestration

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Where most teams are

- Bots automating individual tasks
- People stitching the steps together
- AI pilots built alongside automation, not on top of it

What this means

- Existing robots reused as the hands of the journey
- Agents handle judgement, people make the decisions
- One orchestrated journey, end to end

Your estate is your head start

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Orchestration connects robots, agents and people into one journey — New

Agents add judgement where rules run out — New

What you already have

Robots with approved access
Already connected to your core systems, securely

Tested, trusted logic
Rules and workflows proven in production

Integrations already built
Connectors, APIs and credentials in place

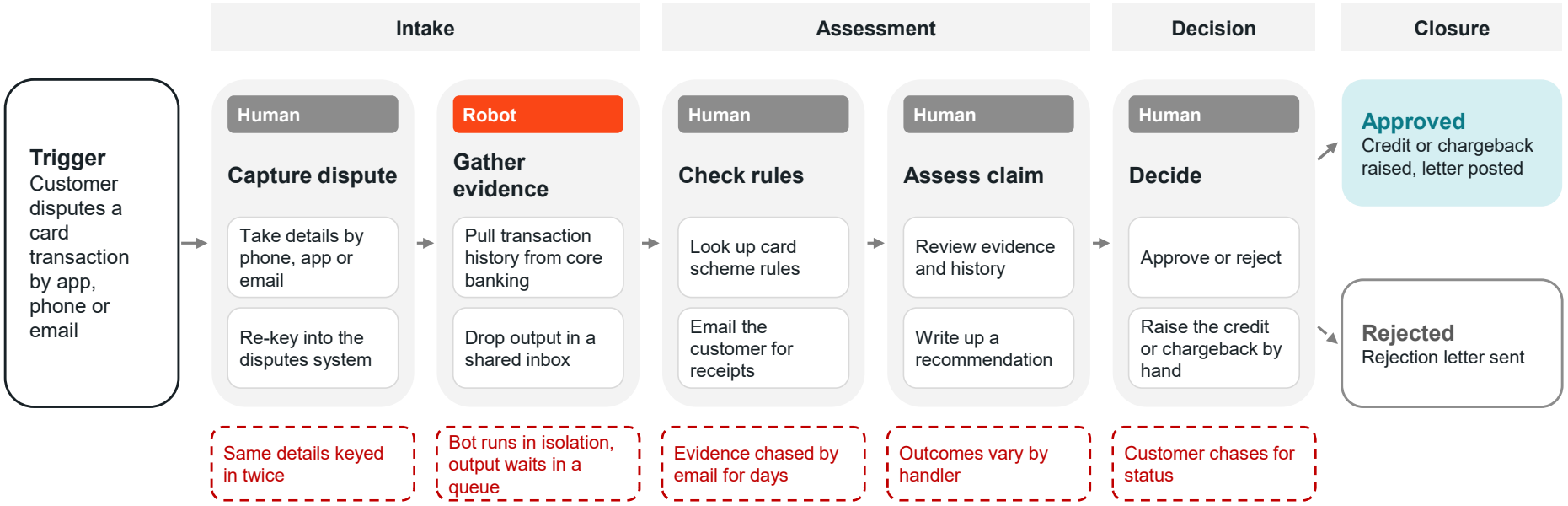
People and skills
A CoE that knows your processes

Governance in place
Monitoring, audit trails and change control

Already yours

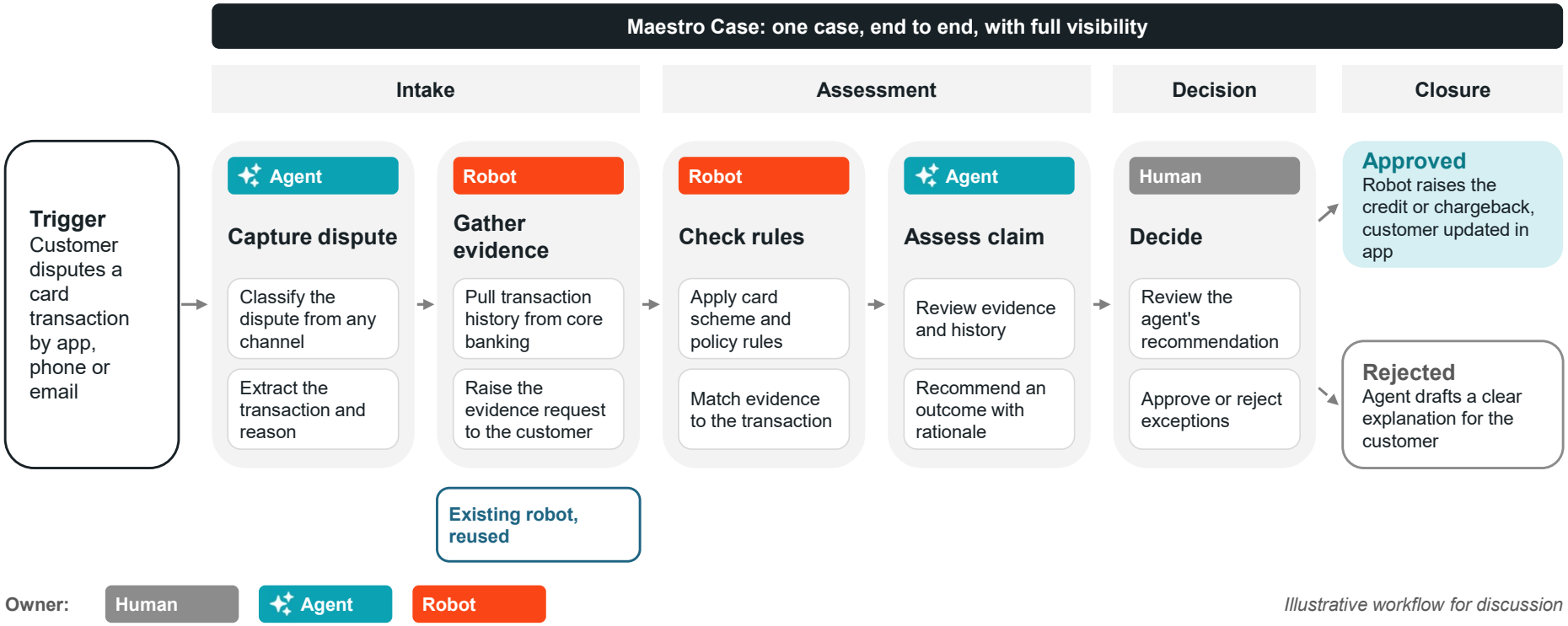
You're not starting from zero. Agents and orchestration build on what you've already proven.

Card dispute today: as-is



Illustrative workflow for discussion

Card dispute orchestrated: to-be



Illustrative workflow for discussion

Proof: Banco Azteca

97h to 4.8h
average dispute resolution time

8,800+
processes automated, equivalent to 3,300+ FTEs of capacity

"As our automation program matured, we realized the next opportunity wasn't automating more tasks. Instead, our focus moved to coordinating entire business processes."

Manuel Delgado, Chief Operating Officer & Head of Customer Service, Banco Azteca

Their journey

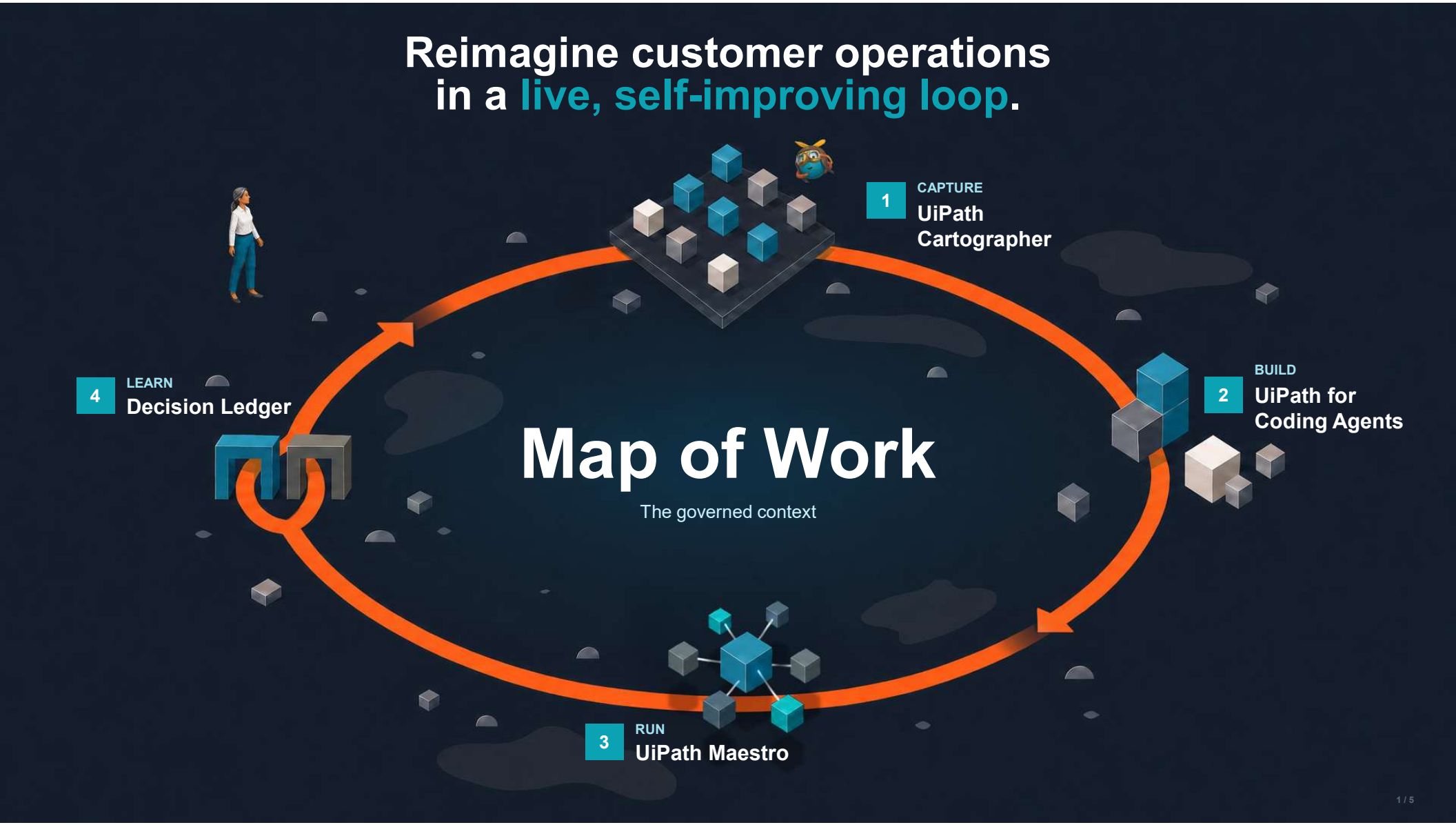
Automate
Started with RPA in 2020 and built an AI and RPA CoE

Scale
Hundreds of automations, now 320+ solutions in production

Orchestrate
Maestro connects people, AI, systems and partners end to end

Source: UiPath customer story, Banco Azteca (2026).

Reimagine customer operations in a live, self-improving loop.



Your customer journeys, mapped

Illustrative process repository. Every process has a Map of Work, versioned with a named owner.

Process	People	Systems and data	Rules	Exceptions and judgment	Measurement	Status
Card disputes	Handler, approver	Card platform, core banking	Card scheme rules	High-value cases	Resolution time	Running on Maestro

Map → Build → Run → Learn from every decision

Your customer journeys, mapped

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Process	People	Systems and data	Rules	Exceptions and judgment	Measurement	Status
Card disputes	Handler, approver	Card platform, core banking	Card scheme rules	High-value cases	Resolution time	Running on Maestro
Complaints	Handler, QA reviewer	CRM, case system	Response deadlines	Redress, vulnerability	Time to resolve	Approved map
Servicing requests	Service colleague	Core banking, CRM	Eligibility rules	Signs of vulnerability	First-contact resolution	Approved map
Insurance claims	Claims handler	Policy admin, claims	Cover and fraud rules	Complex claims	Cycle time	In review
Collections	Collector	Core banking	Forbearance rules	Hardship	Customer outcomes	Draft

Map → Build → Run → Learn from every decision

Three things to take away

Three things to take away

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You're not starting from zero

- Your automations are your head start



Connect before you build

- Orchestrate what you have first



Orchestrate the journey, not the task

- Robots, agents and people in one flow

Where to go from here

Many of these journeys run straight into KYC and fraud checks, which is exactly where we pick up on **3 November** with Protect.

Register for the full series:

start.uipath.com/FS-in-AI-WBN-Series.html

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Your questions

Thank you · Scaling AI securely in financial services, part 1 of 4

Webinar Series
Scaling AI Securely in Financial Services

Date	Topic
Session 1 **20 October:**	**TRANSFORM | Reimagining customer operations**
	Move beyond isolated automations to connected customer journeys.
Session 2 **3 November:**	**PROTECT | Modernising financial crime operations**
	Strengthen financial crime operations for an increasingly complex risk landscape.
Session 3 **17 November:**	**ASSURE | Transforming controls testing**
	Expand assurance without expanding your team
Session 4 **1 December:**	**GOVERN | Building trusted AI foundations**
	Scale AI with confidence.