

alteryx

# Do You Think or Do You Know?

## Designed Trusted GenAI in Financial Services

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# AI Strategy is Broken

When Gen AI use cases make it into production...



...but most never make it out of the pilot stage



*Source: 2025 MIT AI Study*

# GenAI at the Input

## DEFINITION

Ingest and normalize unstructured inputs such as documents, emails, and free text.

## KEY CONSIDERATIONS

Key trust controls:

- Accuracy thresholds
- Confidence scoring
- Validation and exception handling

# GenAI in the Process

## DEFINITION

Embed GenAI within data preparation and transformation workflows.

## KEY CONSIDERATIONS

Key trust controls:

- Data lineage
- Transparency
- Explainability
- Governance

# GenAI at the Output

## DEFINITION

Interpret data and generate insights, narratives, or recommendations.

## KEY CONSIDERATIONS

Prepared data with clear context translates to higher quality AI outcomes

# GenAI Patterns

1

## GenAI at the Input

Ingest and normalize unstructured inputs such as documents, emails, and free text.

2

## GenAI in the Process

Embed within data preparation and transformation workflows.

3

## GenAI at the Output

Interpret data and generate insights, narratives, or recommendations.