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AI Agents in The Financial Industry

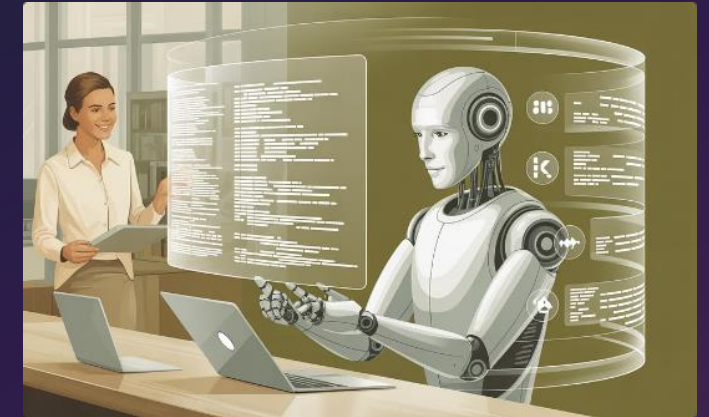## By Georg Langlotz

My Three Agentic AI Convictions

AI Agents will Overtake Staff in Numbers

Organizations will deploy more AI agents than human employees, fundamentally transforming operational models.
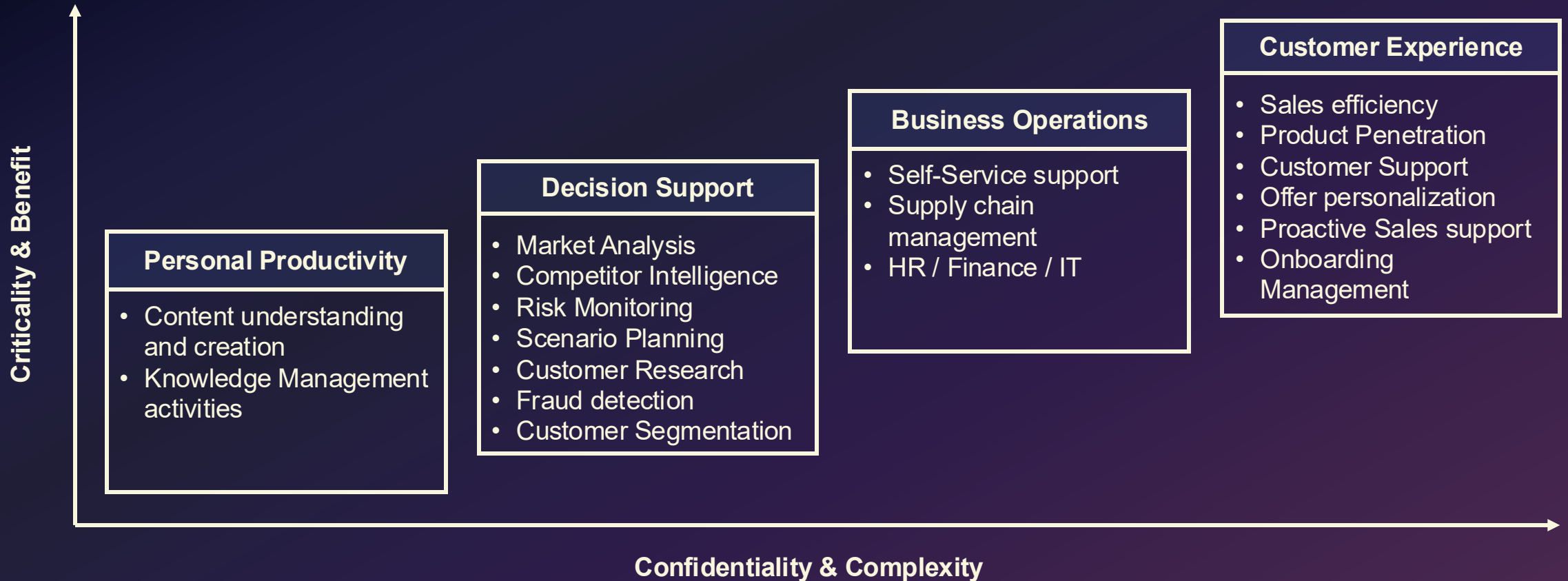
Exponential Productivity Gains

Human-machine collaboration will drive unprecedented efficiency improvements, increasing productivity by 200%.
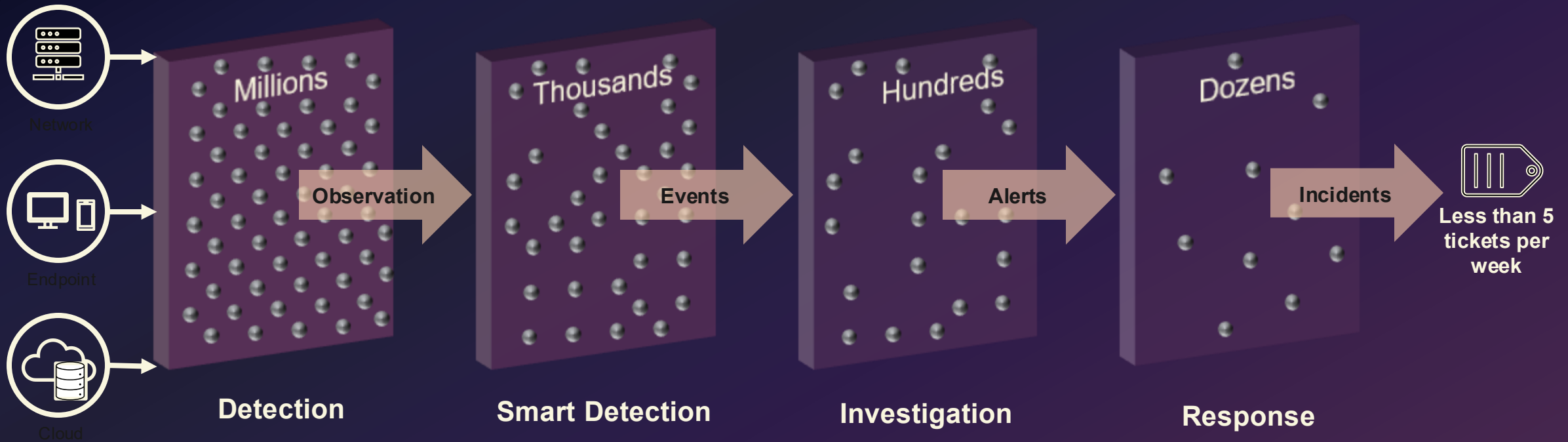
Strategic Task Redistribution

"Agentic AI" will assume specialized responsibilities and augment human capabilities, rather than replacing the workforce.

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Use Case Categories of AI Agents

Criticality & Benefit (vertical axis)

Confidentiality & Complexity (horizontal axis)

Personal Productivity
- Content understanding and creation
- Knowledge Management activities

Decision Support
- Market Analysis
- Competitor Intelligence
- Risk Monitoring
- Scenario Planning
- Customer Research
- Fraud detection
- Customer Segmentation

Business Operations
- Self-Service support
- Supply chain management
- HR / Finance / IT

Customer Experience
- Sales efficiency
- Product Penetration
- Customer Support
- Offer personalization
- Proactive Sales support
- Onboarding Management

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Use Case Categories of AI Agents

Network

Endpoint

Cloud

Millions
Observation
Thousands
Events
Hundreds
Alerts
Dozens
Incidents
Less than 5 tickets per week

Detection

Smart Detection

Investigation
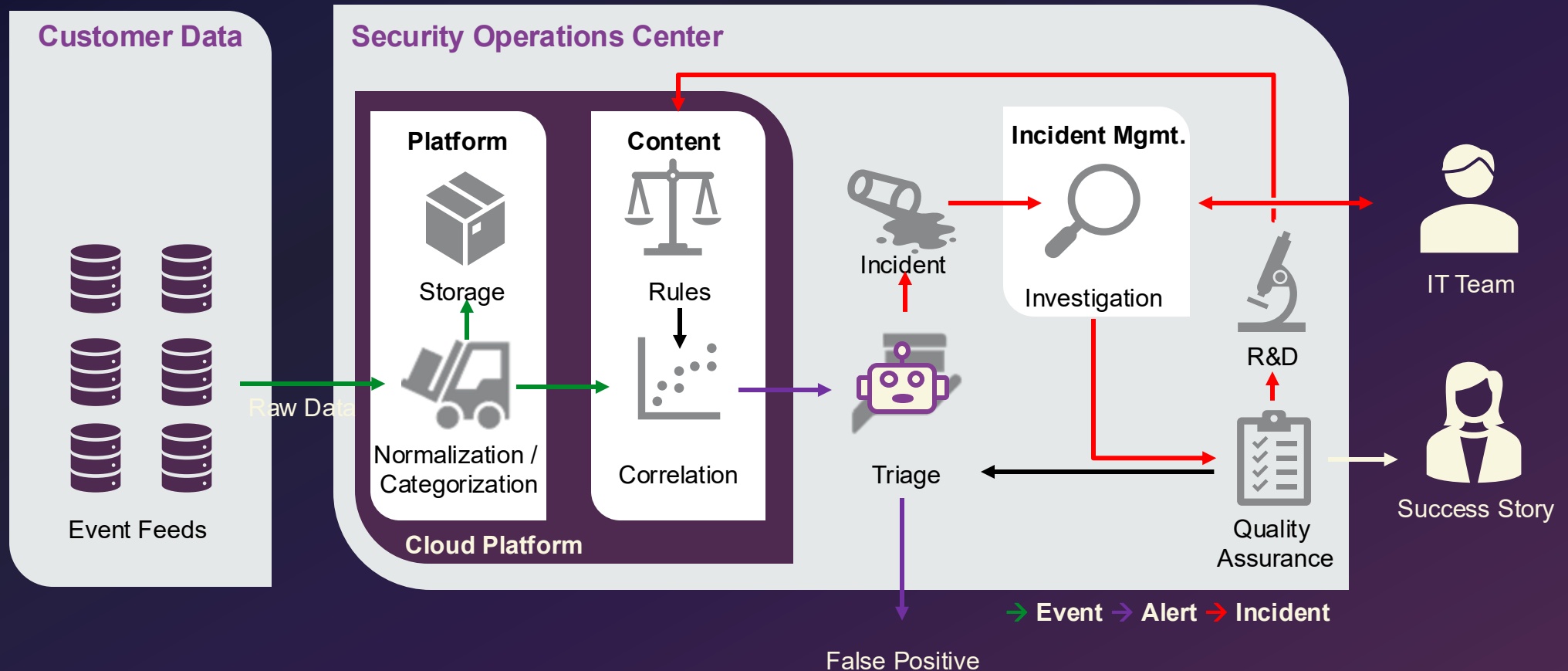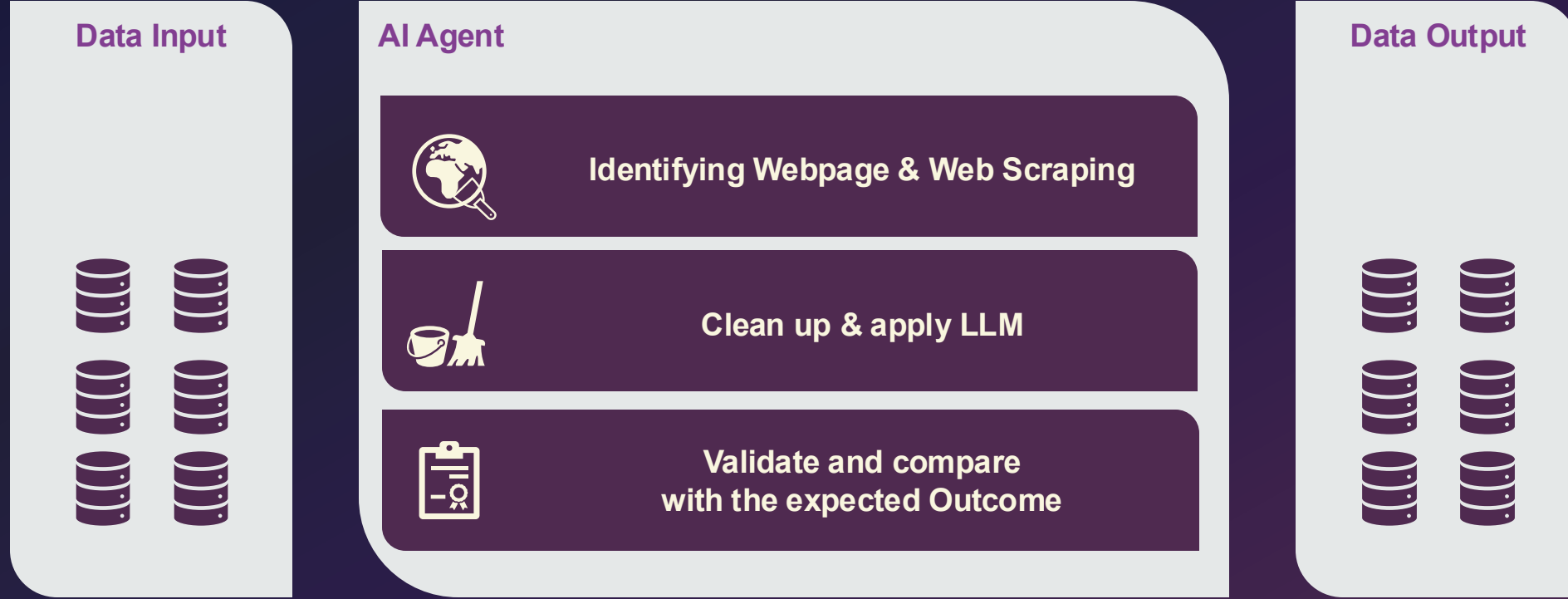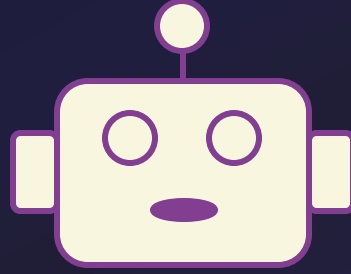
Response

> Out of millions of observations per day, fewer than a handful of actions are generated per week.

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AI Agents reduce False Positives

AI Agents reduce False Positives

Data Input

AI Agent

Identifying Webpage & Web Scraping

Clean up & apply LLM

**Validate and compare
with the expected Outcome**

Data Output

Why now
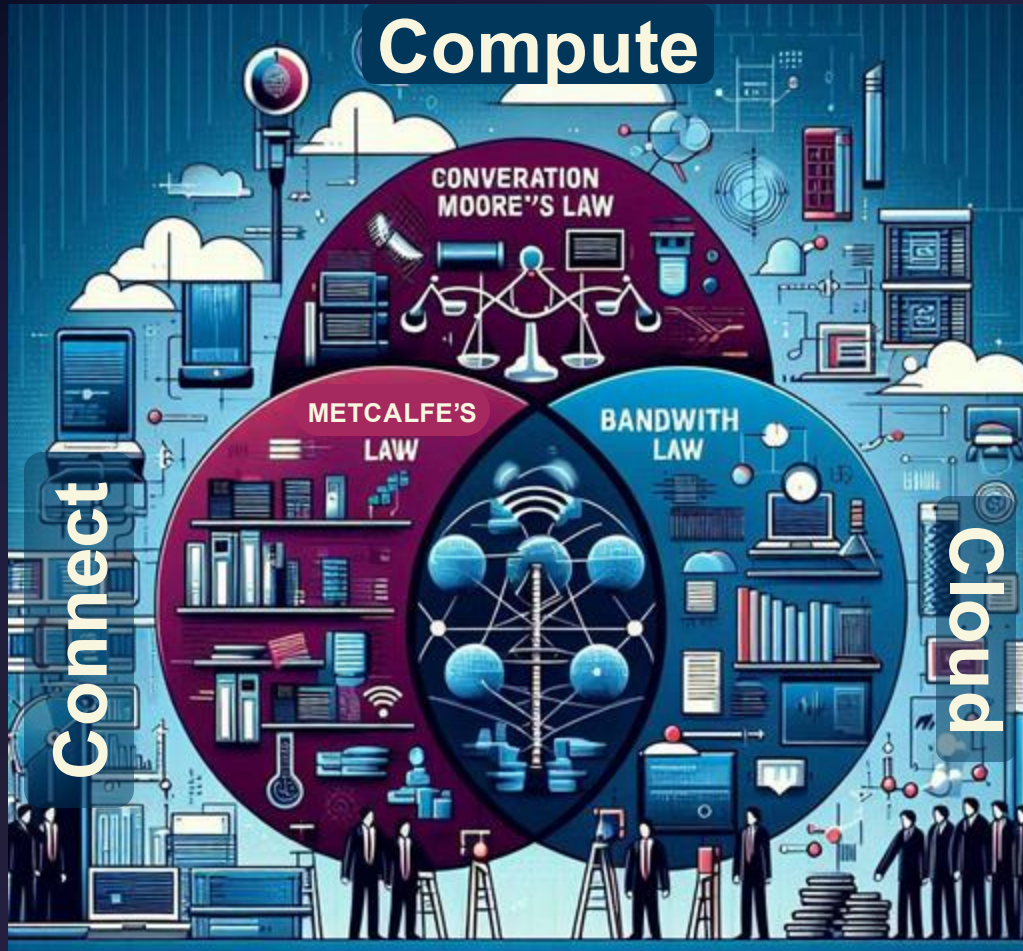
- **Products**
- **Processes**
- **Services**
- **Business Models**
- **Organizing Logic**

"Conversation Moore's Law and Bandwidth Law." (n.d.).
Retrieved March 14, 2025, from pplx-res.cloudinary.com

The AI Revolution

Thriving Within Civilization's New Big Disruption

Explore how 34 global experts reveal AI's power to transform industries, work, and creativity, ushering in a new era of human-machine collaboration.

Get practical strategies to harness AI's potential responsibly, with real-world examples across healthcare, business, sustainability, and leadership.

Equip yourself to thrive, not just adapt, in civilization's next big disruption, with insights to lead, innovate, and succeed in the age of AI.

Co-authored by industry experts, including Georg Langlotz
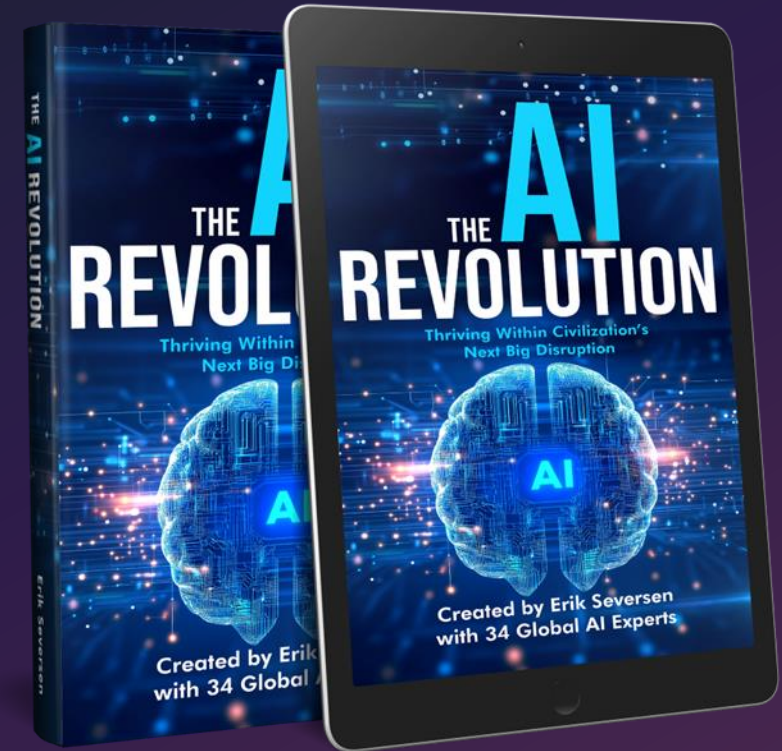
Available on Amazon

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SKILL SUMMARY

Data and AI Strategy

Project Management

Product Management

Stakeholder Management

Business Transformation

Georg Langlotz

Exploiting Data and AI to Generate and Accelerate Growth

Personal Profile

- Experienced Data Analytics Delivery Lead focusing on Front Office Digital Business Transformation and building Award Winning Operational Risk Solutions.

- More than 20 years of experience in leadership of global teams, actively transforming teams and departments, coaching and motivating employees to consistently exceed customer expectations in international and dynamic environments in various industries.

- Seasoned strategist with an analytical, structured, and entrepreneurial mindset. Experienced in driving business and operational models as well as technology innovation.

- Digitalization enthusiast and best-selling author with exposure to customer experience management, data analytics, GenAI, data & machine learning governance, Agentic AI process automation, process excellence, and an interest in delivering business model innovation with disruptive technologies.

Work Experience

Since 2023, GCRG Head of AI Centre of Excellence, ED at UBS AG

2017-2023, Data Product and Delivery Manager, VP at Credit Suisse AG

2012-2015, Director Operations Switzerland at Colt Group plc

2005-2012, Head of Global Platform Engineering at Man Group

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