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From Pilot to Impact: The Data Capabilities You Need to Scale Enterprise AI

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AI is the new digital
Cycles of disruption are accelerating

Pre-Y2K business process optimization

From manual to automation

Digital transformation and move to the cloud

From legacy systems to digitalization

Agentic AI and autonomous agents

Decisioning shifts from humans to agents

?

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Agentic processes are reshaping financial services
Agent-based decisioning raises the bar on data quality, speed, and security
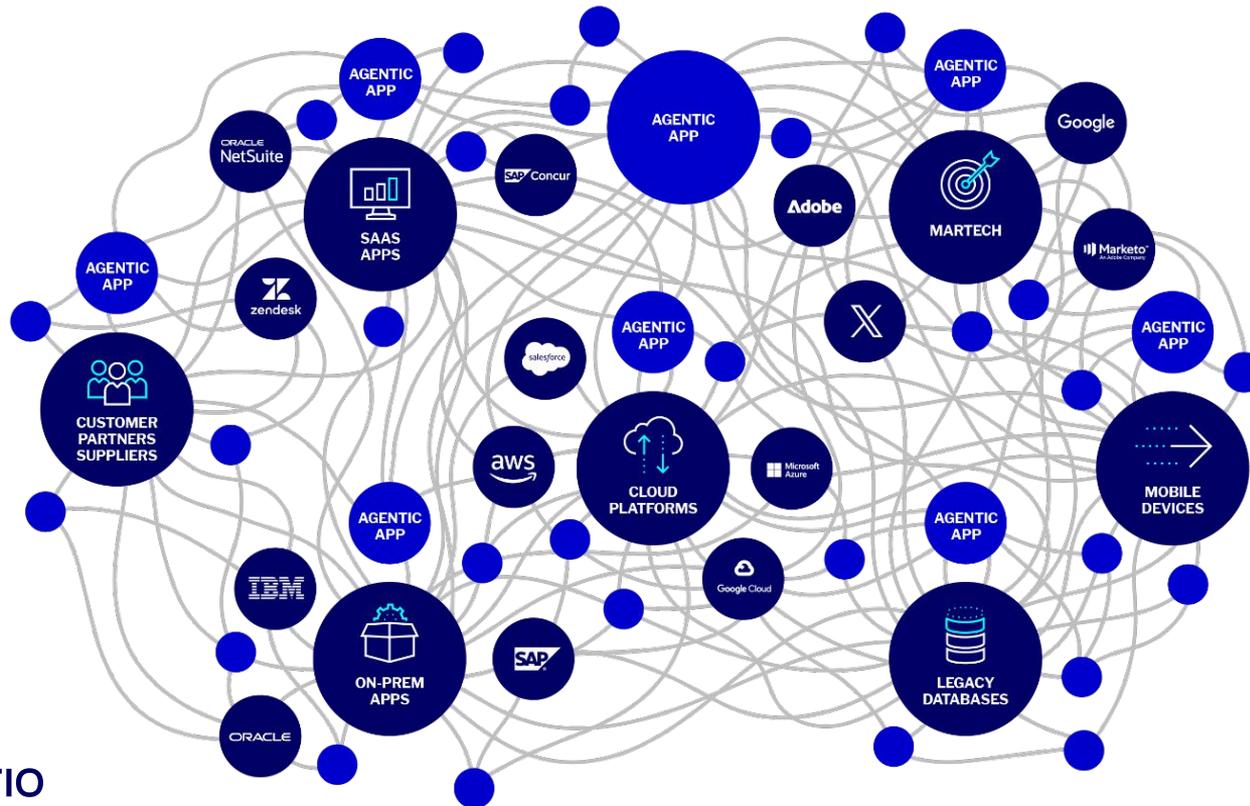

Customer service

Loan underwriting

Fraud detection

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Siloed data is the kryptonite of successful AI strategies

Poor data quality erodes trust

Data debt increases with aging technology and agentic apps

Complex landscape increases operational friction
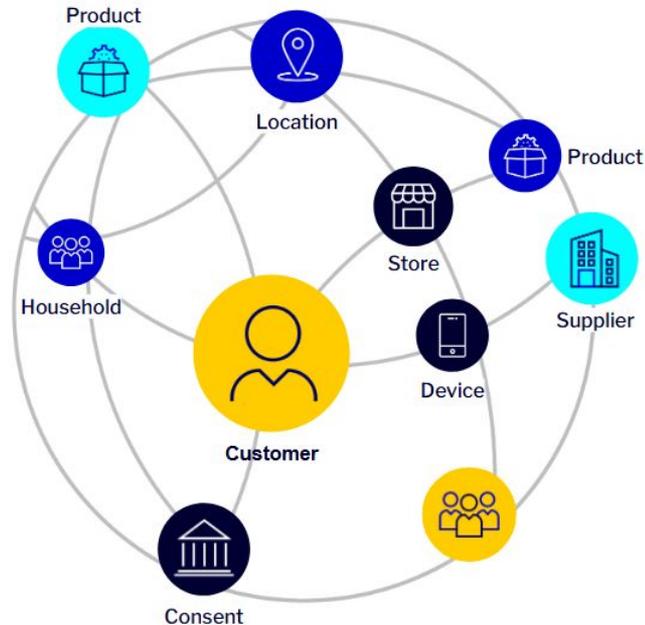
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What's needed: A trusted system of context

Preferences, Insights, and Recommendations

- Channel preferences
- Churn risk
- Offered products

Interactions and Transactions

- Product purchase
- Returns
- Web Visits

Product
Location
Product
Store
Supplier
Household
Device
Customer
Consent

Consent Information

- Opt-outs
- Subscribes
- Multi-level consent

Single View

- Name, phone, email, address
- Applications and systems
- Social
- Third-party data sources

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Workshop Activity

The consequences of lacking a unified, rich system of context

Example use cases where data silos slow down digital transformation or AI adoption

What is in the way of data unification?

What are the technology or organizational barriers to creating a trusted, unified, rich view of core business data?

Unleashing growth and efficiency

List 1-2 use cases that can bring significant growth, efficiency, or risk & compliance management improvements if you had a unified, trusted view of customers or product, or suppliers etc.

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Workshop Activity

Data Unification – The Foundation for Business Growth

How data silos slow down digital transformation and AI adoption

The Importance of Trusted, Unified Data in the AI Era

Why AI success is dependent on high-quality, clean and unified data

Unleashing Your Agentic AI Future

Why deploying agentic AI will give you your next competitive edge

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Reltio unifies and mobilizes core enterprise data

SaaS Apps

Cloud Platforms

Customers / Partners / Suppliers

Third Party Data Sources

Packaged Apps

Custom Apps

AGENTFLOW

CONNECT

ENRICH

CLEANSE

UNIFY

RELTIO

Martech

Mobile Devices

Analytics, ML and AI

Databases

Trusted, unified,
context-rich profiles

Data governance
AI agents

Real-time and ready for
operations

Secure, scalable,
and flexible

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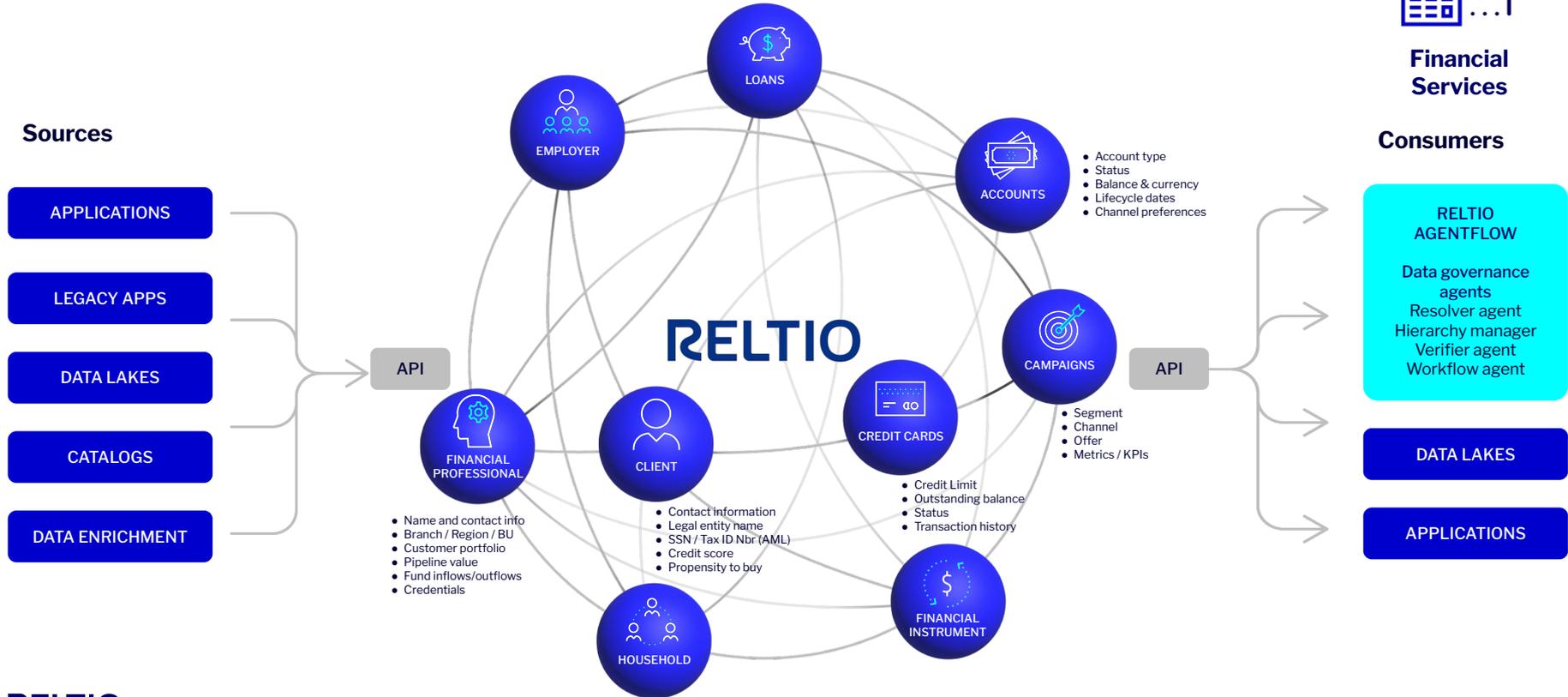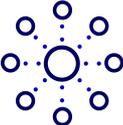
Reltio Intelligent Data Graph

Sources

- APPLICATIONS
- LEGACY APPS
- DATA LAKES
- CATALOGS
- DATA ENRICHMENT

API

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EMPLOYER

LOANS

ACCOUNTS
- Account type
- Status
- Balance & currency
- Lifecycle dates
- Channel preferences

CAMPAIGNS
- Segment
- Channel
- Offer
- Metrics / KPIs

FINANCIAL PROFESSIONAL
- Name and contact info
- Branch / Region / BU
- Customer portfolio
- Pipeline value
- Fund inflows/outflows
- Credentials

CLIENT
- Contact information
- Legal entity name
- SSN / Tax ID Nbr (AML)
- Credit score
- Propensity to buy

CREDIT CARDS
- Credit Limit
- Outstanding balance
- Status
- Transaction history

HOUSEHOLD

FINANCIAL INSTRUMENT

Financial Services

Consumers

API

RELTIO AGENTFLOW

Data governance agents
Resolver agent
Hierarchy manager
Verifier agent
Workflow agent

- DATA LAKES
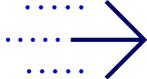- APPLICATIONS

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Why Reltio

Trusted, agent-ready profiles

Semantic Reltio Intelligent Data Graph

Built for agentic AI with API-first architecture

Milliseconds-delivery with Reltio Lightspeed Data Delivery Network

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Reltio Data Cloud
Built for the operational reality of agentic AI

Trusted, unified data in milliseconds

- Real-time or batch at enterprise scale
- Continuous curation and governance for high-quality core data
- Ultra-low latency performance at scale with our data delivery network
- Intuitive interface for non-technical users

Agent-driven productivity

- Semantic layer through Reltio Intelligent Data Graph
- Agentic data platform with Reltio AgentFlow
- Connect to any agentic processes with Reltio AgentFlow MCP Server
- Data governance agents
- LLM-driven, pretrained ML model for entity resolution

Extensible and scalable

- Extends to any data source or domain
- Flexible data model adapts to your business
- Rapid scalability and integration
- Open ecosystem, responsive architecture

Certified secure and compliant

- HITRUST, SOC 1, SOC 2 certified
- HIPAA, GDPR, CCPA, MPLS 2.0 compliance supported
- Supports data residency sovereignty requirements
- Customer managed encryption key and AWS PrivateLink
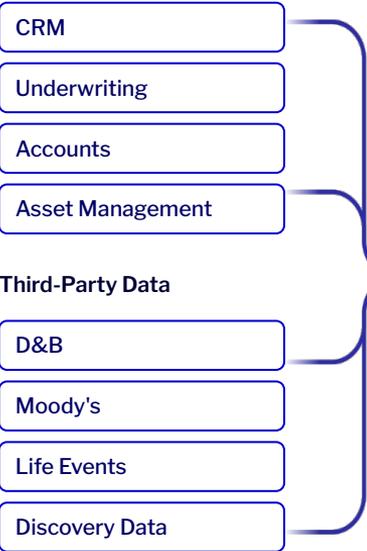- Reltio Trust Center

Fast time to value

- Prebuilt industry-specific velocity packs
- Low-code/no-code integration development and prebuilt integrations
- Prescriptive delivery methodology with go-live in 90 days

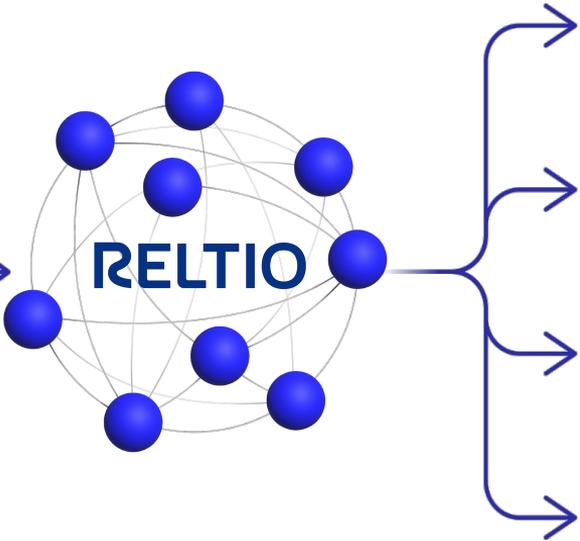**RELTIO**

Key business initiatives we activate for financial services

Financial Services

COLLECT DATA

CRM

Underwriting

Accounts

Asset Management

Third-Party Data

D&B

Moody's

Life Events

Discovery Data

UNIFY DATA

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CONSUME DATA

Growth	Efficiency	Risk & Compliance
Digital Engagement	Client Relationship Management	Risk Management
Operate as One Firm	Process Optimization and Simplification	Compliance
Targeted Marketing/ Customer Analytics	M&A Integration, Fintech Integration, and Open Banking	Global Privacy and Consent Management

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Check out our whitepaper

www.reltio.com

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