



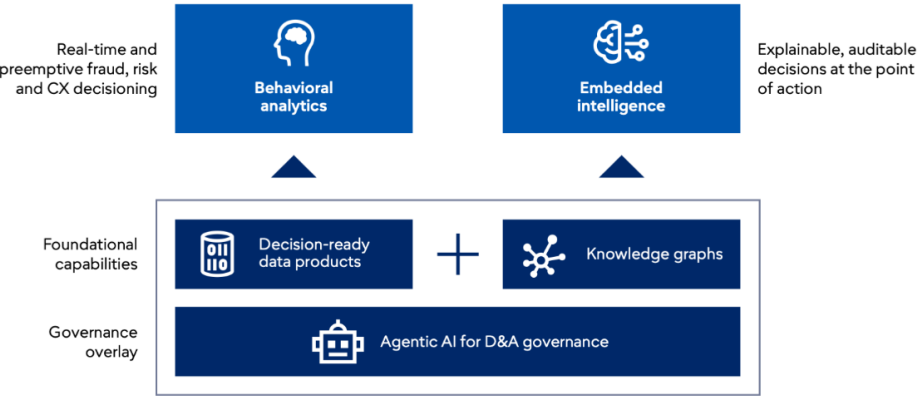
May 2026

Brillio's BFSI Use Cases for Salesforce

BFSI firms are meeting the changing needs of their customers with innovative products, experiences, and digital tools. We are helping them create right data foundation to enable AI in their organization

In 2026, scaling AI and intelligent automation within financial services is a major priority for banking and insurance CIOs.

This requires a deliberate shift toward decision-ready data, semantic grounding, and computable Data governance, to enable AI to operate safely inside regulated workflows and produce demonstrable outcomes



Financial institutions are responding to data trends toward engineering domain-owned, consumption-ready data products

- Impact :
- Reduce decision latency
 - Provide consistent, governed inputs across risk, fraud, underwriting, and claims









Key Barriers to Establishing an AI-Ready Data Foundation in BFSI organizations

Current data foundations are optimized for reporting—not for AI-driven, real-time, and regulated decisioning.

- 1 Fragmented Data Landscape Limits Enterprise Visibility**
Disparate legacy systems and siloed platforms prevent a unified, trusted view of data
- 2 Data Is Not Structured for Consumption**
Lack of standardized, governed data products results in repeated data engineering effort
- 3 Missing Semantic Layer Impacts Trust & Explainability**
Inconsistent definitions and lack of business context lead to unreliable insights, limiting AI adoption
- 4 Governance Is Reactive, Not Embedded**
Manual, periodic governance processes cannot keep pace with AI and real-time data usage
- 5 Platforms Not Designed for Real-Time Decisioning**
Batch-oriented architectures restrict the ability to operationalize AI in critical workflows

From Platform Modernization to AI Use Cases — Our BFSI Execution Footprint

← Our clients →

Our solutions on	 Global Asset Manager	 Global Investment Bank	 Global Payments Network	 US Regional Bank	 Financial services company	 Auto Finance Company	 European Credit Org
 ADAM							
Data Platform Design & Modernization	✓		✓	✓	✓		✓
Data Quality & Observability		✓	✓	✓	✓		✓
Data Governance, Lineage & Controls		✓					
Data Products & Domain Data Models	✓		✓	✓			
Data Operations				✓			
AI enablement and CoE build						✓	
AI ready platform enablement				✓	✓	✓	
AI use case implementation				✓		✓	

Success Stories

Financial services company

Designed and implemented a Microsoft Fabric-based data platform integrating batch and streaming pipelines with enterprise governance. Enabled an AI-ready foundation with improved scalability, security, and cost efficiency for time-sensitive fintech analytics use cases.

- **Enabled AI ready platform with guardrails**
- **Reduced maintenance costs by 15%**

US Regional Bank

Established a scalable data platform with strong governance and operational controls, enabling production analytics and AI initiatives across banking domains. Delivered sustained platform operations and modernization to support regulated, enterprise-wide data consumption.

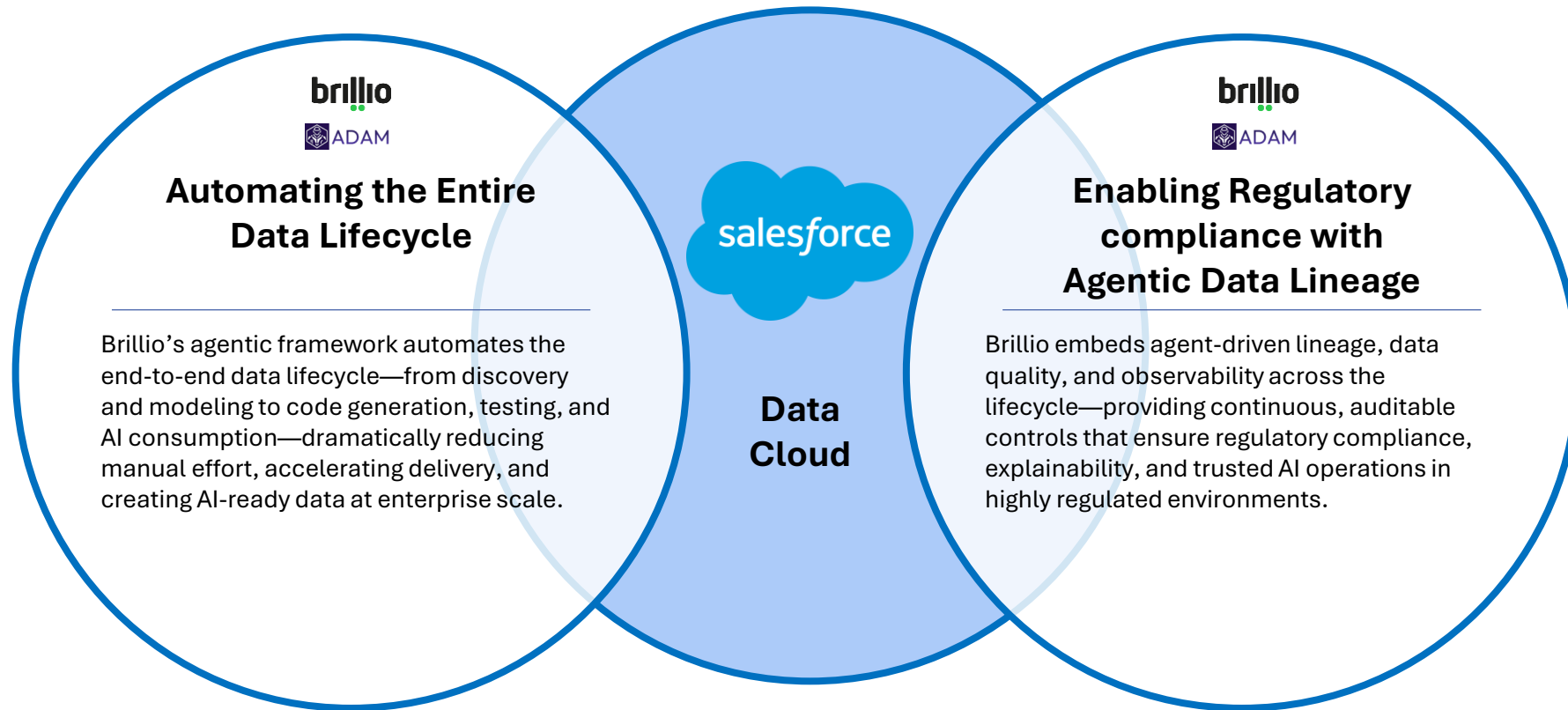
- **>80% identifier consistency across data layers**
- **Reduced lineage extraction and validation time by 50%**

Global Investment Bank

Modernized the data foundation and implemented governed, AI-ready wealth management platform supporting large-scale document processing and analytics. Improved data reliability and operational efficiency while ensuring auditability and regulatory compliance across investment operations.

- **4X faster delivery of insights to advisors and wealth managers**

Brillio can enable Data modernization and regulatory compliance in the Salesforce ecosystem

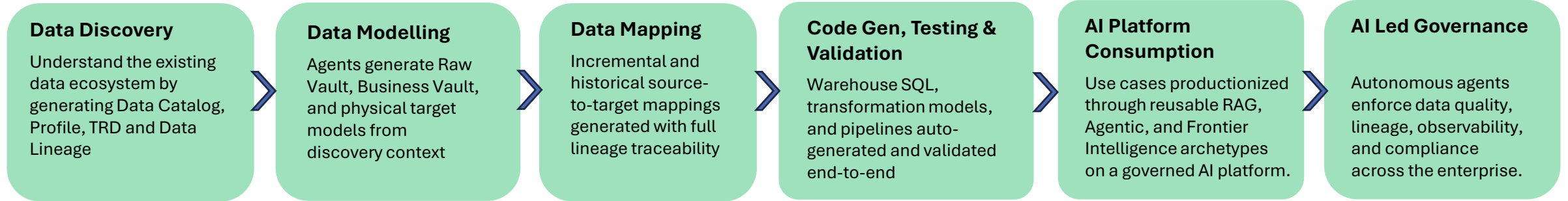


BFSI organizations must establish a robust, enterprise-grade data foundation to effectively scale AI and business use cases. Salesforce and Brillio can jointly accelerate this journey by enabling rapid, compliant deployment of enterprise-scale use cases on the Salesforce data ecosystem—ensuring regulatory alignment while driving faster time to value.

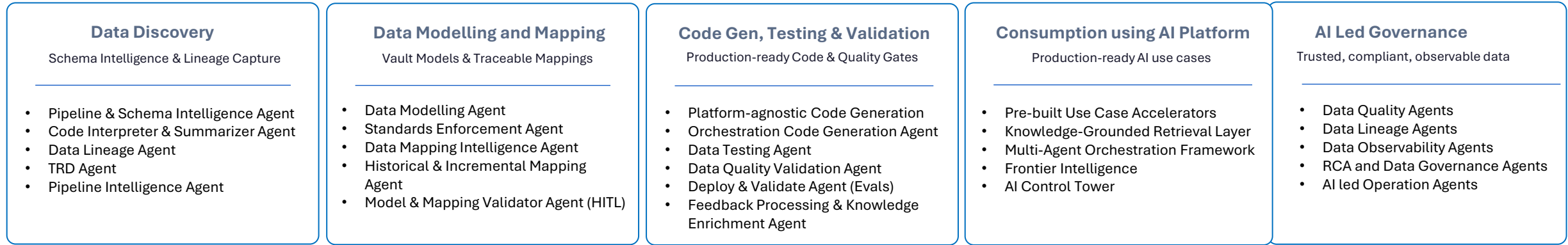
Brillio Automates the Entire Data Lifecycle for enabling AI-Ready Enterprises

An end-to-end agentic framework that automates the full data development lifecycle from **Discovery** through to **Governance and Consumption**

Steps involved



Our agents across the lifecycle



80% Faster time to complete Discovery

75% Faster Model and Mapping Design

4X Faster Code Delivery vs Manual

~60% Overall Cost Reduction across DDLC

~45% Improvement in governance effectiveness & compliance

Success Story

Brillio as an advisory and implementation partner helped a leading US based Banking client to modernize its tech stack from legacy on-prem systems (like Netezza and Oracle) to a robust Snowflake on AWS data platform using Agentic Data Development Lifecycle (Agentic DDLC) to enable AI use cases (AI/ML, Gen AI, and Agentic AI) using AWS components (Sagemaker, Bedrock etc.) accelerating the time to value from use case identification to implementation.

Enabling better compliance through our Agentic Data Lineage solution

Many banks have started to renew their efforts towards BCBS 239 compliance

What are banks doing?

- 1 Enhancing **data traceability by deploying enterprise-wide lineage capabilities** that connect data from source systems to final reports
- 2 Focusing on **de-siloing through unified data platforms**, standardising reporting code, and eliminating manual lineage
- 3 **Implementing rule libraries** (accuracy, completeness, timeliness), issue management, and control evidence linked directly to lineage nodes

Success Story

Implemented agent-driven, column-level data lineage across SQL, ingestion pipelines, and DBT models to meet regulatory transparency requirements. Established auditable source-to-target traceability, impact analysis, and explainability aligned to BCBS 239, strengthening governance, data integrity, and audit readiness across enterprise data platforms.

Brillio's Agentic Data Lineage Solution

Brillio's Agentic Data Lineage solution provides end-to-end, column-level visibility into how data moves, transforms, and is consumed across complex enterprise data ecosystems.

Built using agentic AI and knowledge graphs, the solution automates lineage discovery across ingestion, transformation, and reporting layers—eliminating manual lineage documentation and accelerating regulatory compliance.

Solution overview

- Automatically scans code repositories, SQL, ingestion frameworks, to discover lineage signals.
- Uses specialized AI agents to parse schemas, transformations, and inter-object dependencies.
- Extracts column-level metadata, transformation logic, and source-to-target mappings across the data lifecycle.
- A Graph Builder Agent unifies SQL, and ingestion lineage into a single, versioned, queryable graph.
- Enables impact analysis, reverse engineering, audit readiness, and explainability via NLP-driven, governed access for business and technical users.



— Thank you! —
Let us create something

brilliant
together!

