



AI in Financial Services



The biggest opportunity in financial services isn't replacing advisers or analysts. It's reducing the time spent on compliance, research, and administrative processes while improving client insight and regulatory oversight.

Common Challenges

- ▶ **Client Meeting Notes**
Advisers spend significant time writing post-meeting summaries and file notes.
- ▶ **Compliance Documentation**
Regulatory documentation and suitability records require detailed reporting.
- ▶ **Research & Analysis**
Analysts review large volumes of financial reports and market data.
- ▶ **Client Communications**
Client updates, portfolio reports and email responses take time.
- ▶ **Client Onboarding**
Identity checks, KYC and onboarding documentation are manual.
- ▶ **Fraud & Risk Monitoring**
Detecting suspicious transactions and financial crime requires constant oversight.

AI Assistants

Productivity inside Outlook, Teams, Word and Excel.

- ▶ Client meeting summaries — faster file notes
- ▶ Research summaries — quicker market insights
- ▶ Client report drafting — faster communication

Outcome

Reduced admin workload and more time focused on client relationships.

Automation

Removes repetitive compliance and operational processes.

- ▶ Client onboarding workflows — faster KYC processing
- ▶ Automated compliance documentation
- ▶ Financial report generation
- ▶ Fraud alert triage workflows

Outcome

Reduced operational overhead and faster regulatory documentation.

AI Agents

AI agents retrieve information, monitor risk and support decisions.

- ▶ Compliance knowledge agent — instant regulatory guidance
- ▶ Fraud monitoring agent — detect suspicious activity patterns
- ▶ Client information agent — rapid access to client data
- ▶ Market research agent — summarise financial data quickly

Outcome

Improved compliance monitoring and faster financial insights.

Real World Example

JPMorgan
CHASE & CO.

JPMorgan AI-Assisted Research & Operations — JPMorgan has deployed AI tools to support analysts by summarising financial research and automating document review.

Results include:

- ▶ 40% productivity improvement in research workflows
- ▶ Faster analysis of financial filings and regulatory documents
- ▶ Reduced time spent reviewing documents — AI enables professionals to spend more time advising clients.

A Simple ROI Example

- 1 Number of Employees**
30 employees across the business
- 2 Time Spent on Repetitive Tasks**
Significant time lost weekly to manual processes and admin
- 3 Time Recovered With AI**
AI assistants, automation and agents typically recover 10–12 hours per employee per week

EXAMPLE BUSINESS IMPACT

- ▶ **Time Saved:** 10 hours per employee per week
- ▶ **Organisation:** 30 × 10 hrs = 300 hours/week
- ▶ **Annual Hours:** 300 × 52 = 15,600 hours recovered
- ▶ **Value:** At £25/hr = **£390,000** capacity unlocked

15,600

Hours of Productivity Every Year

£390k

Equivalent Operational Capacity

AI ROI is not about replacing people. It's about empowering teams to spend less time on repetitive work and focus on higher-value activities.

Assess Your AI Readiness

⚠ The Risk of Getting AI Wrong

Deploying AI without the right foundations is like **building a skyscraper on a swamp**. Shadow AI creates serious data, security and compliance risks.

AI adoption involves **data, security, governance, compliance and operational change**. This is why organisations turn to MSPs like Jera IT to guide their AI journey safely.

Our AI Readiness Assessment ensures the right foundations are firmly in place before deployment.



Business, Strategy & People Readiness

Strategic alignment and cultural preparedness for AI adoption.



M365 Technical & Infrastructure Readiness

Is your Microsoft 365 environment ready for AI to work reliably?



Data, Security & Governance Readiness

Will data be surfaced safely, securely and compliantly?



Adoption, Change & Operating Model Readiness

Who will own AI and will adoption truly stick?

[Book Your AI Readiness Assessment →](#)

AI & Automation Discovery Workshop

The real challenge isn't knowing *if* AI can help — it's knowing *where it delivers the greatest impact first*. Our workshop identifies your highest-value opportunities and builds a clear adoption roadmap.

- 1 Uncover Repetitive Work Tasks**
Identify manual processes that can be automated, freeing up valuable employee time.
- 2 Spot AI Agent Opportunities**
Pinpoint where agents can retrieve information, support decisions and automate tasks.
- 3 Remove Information Bottlenecks**
Identify where employees lose time searching for documents, data or knowledge.
- 4 Prioritise High-Impact Use Cases**
Focus on AI opportunities most likely to deliver fast ROI and measurable gains.

Typical Workshop Outcome:

- ▶ A clear list of AI opportunities across your organisation
- ▶ Prioritised use cases based on business impact
- ▶ A practical AI adoption roadmap for the next 12–24 months
- ▶ Guidance on governance, security and responsible AI deployment

[Request an AI Discovery Workshop →](#)

Why Scottish Businesses Choose Jera IT for AI

- 1 Scotland's Only MSP with a Dedicated AI Adoption Programme**
The Jera AI Readiness Programme is the only structured AI adoption service built specifically for Scottish businesses — covering readiness, governance, deployment, and measurable outcomes. No other Scottish MSP offers this end-to-end.
- 2 Microsoft Solutions Partner with Deep Security Expertise**
Microsoft Solutions Partner and Cyber Essentials Plus certified. We achieve an average Microsoft Secure Score of 74% for our clients, against an industry average of 31% — your AI deployment is built on a properly secured foundation.
- 3 AI Governance Isn't an Add-On. It's How We Start.**
We map your data, establish access controls, identify shadow AI exposure, and deploy Copilot within your own Microsoft 365 tenant — so your client data, your IP, and commercially sensitive information never enters a public AI model.
- 4 We Measure What AI is Worth Using OI Scoring**
Our Operational Intelligence Scoring system measures time saved by department across your business — giving you a clear, auditable return on your AI investment that you can present to your board, not just believe in.
- 5 Three Scottish Offices. Onsite When You Need Us.**
Edinburgh. Aberdeen. Glasgow. When AI deployment needs hands-on support — training your team, configuring your environment, embedding tools into how people actually work — we're already here, not a remote team who visits quarterly.
- 6 Training Scotland's Next AI Professionals**
Through the Jera IT Academy, we're investing in Scotland's AI and cyber security talent pipeline. Our knowledge of what's coming in AI is current, deep, and built from the ground up — not sourced from vendor briefing notes.