



Unlocking AI's full value in Banking

How unified knowledge
drives real impact at global banks

Table of contents

01	Executive summary
01	Why connected knowledge is the next banking priority
02	How unified knowledge drives impact across banking teams
02	Consumer banking
02	Audit and controls
03	Wealth and investment management
03	Corporate and investment banking
04	Markets
04	Risk management
04	Technology and operations
04	Legal and compliance
05	Human resources
05	Finance and treasury
05	Corporate strategy and business development
06	Projecting financial outcomes with Glean
06	Designed for the tools your teams already rely on
07	Fast time-to-value with a governance-first architecture
07	Enterprise-grade security and compliance
08	To get more from AI, banks need more from their knowledge

Executive summary

Banks around the world are investing heavily in AI – scaling internal tools across tens of thousands of employees and committing billions to innovation and infrastructure. These initiatives are already improving productivity and client service across the industry. But as adoption becomes widespread, the next challenge is clear: getting more from those tools by connecting them to the knowledge employees rely on every day.

When knowledge is scattered across hundreds of systems, even the most advanced AI tools fall short. Banks that want to get more from their existing investments need a way to bring information together – making it easier for employees to find answers, make decisions, and move faster.

Glean's Work AI platform addresses this head-on. By securely connecting siloed systems and surfacing trusted knowledge, Glean gives employees fast, reliable answers and powers intelligent workflows grounded in real enterprise data. Rather than replacing what banks already have, Glean strengthens those tools – acting as the knowledge engine behind internal chatbots and expanding what they can do.

The results are hard to ignore. A Forrester Total Economic Impact™ (TEI) study found that organizations using Glean saw a 141% ROI over three years. Applied at banking scale, that means over 11 million hours reclaimed and \$220 million in annual productivity gains for a workforce of 100,000.

This white paper explores how banks can use Glean to stay at the forefront of AI – turning institutional knowledge into a competitive advantage that drives productivity, compliance, and innovation across every team.

From adoption to impact: Why connected knowledge is the next banking priority

Banks have led the way in adopting AI at scale. From customer service to internal operations, AI-powered tools are already improving efficiency and supporting better decision-making across the global banking workforce. These initiatives reflect a clear priority: using technology to solve practical problems and deliver stronger outcomes for clients and employees alike.

Leading institutions continue to expand their efforts. JPMorgan Chase has rolled out its “LLM Suite” to more than 60,000 employees, supporting tasks like drafting reports and emails across hundreds of use cases. Morgan Stanley is running over 30 internal AI projects focused on increasing advisor productivity. These examples underscore a shift happening across the industry: most major banks already have AI tools in place. What's needed now is a way to make those tools more useful – by connecting them to the full depth of institutional knowledge.

Today, knowledge remains fragmented across a complex ecosystem of applications. Teams spend hours each week switching between systems and piecing together information to do their work. That friction slows down decisions, weakens collaboration, and caps the productivity gains banks can expect from existing AI initiatives.

Solving this challenge requires more than another tool. It takes a secure, intelligent layer that brings information together – making it accessible, actionable, and aligned to each employee’s role and context. Glean was built to do exactly that. By unifying knowledge across systems, Glean helps banks extend the impact of their AI investments and unlock new levels of efficiency, consistency, and employee enablement.

How unified knowledge drives impact across banking teams

Glean helps banks address specific, high-impact challenges by creating a unified knowledge layer that improves efficiency, strengthens collaboration, and supports faster decision-making. The examples below are based on deployments within the financial services industry and reflect the measurable outcomes Glean can drive across key banking functions.

Consumer banking

Wealth advisors need access to up-to-date research, client profiles, and regulatory requirements – but that information is often scattered across multiple platforms. Jurisdictional variation and fragmented documentation make it harder to deliver timely, compliant advice. This slows down due diligence, complicates investment approvals, and increases operational risk.

With Glean, advisors can quickly find the information they need – from investment committee materials to client preferences to product-specific compliance rules. Centralized access supports personalized guidance and smooth coordination across teams. As a result, firms see faster decisions, more efficient advisory processes, and stronger outcomes: higher advisor productivity, improved client retention, fewer compliance issues, and increased assets under management.

Audit and controls

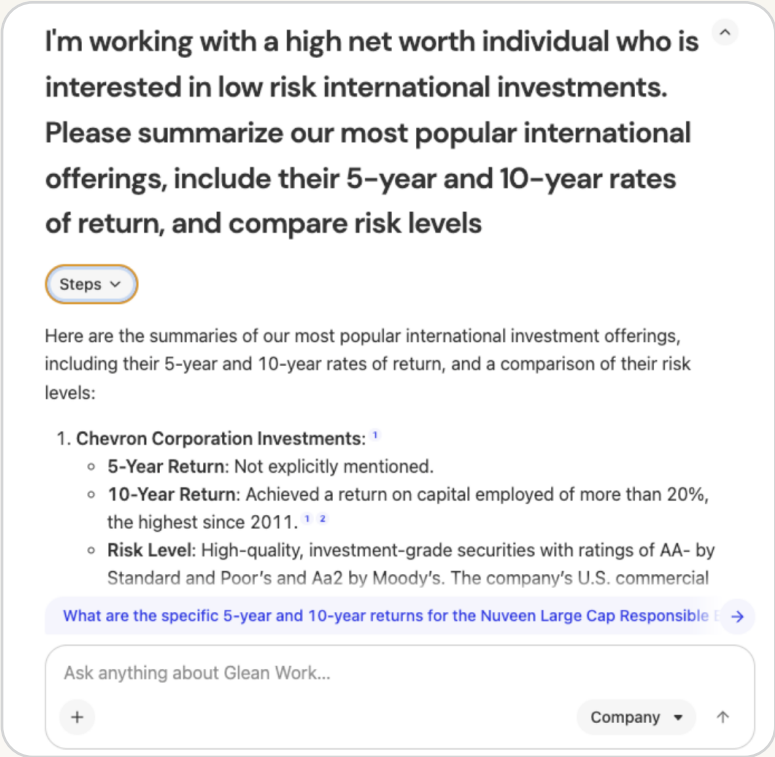
Audit teams struggle with outdated or inaccessible documentation – from internal controls to testing procedures to regulatory guidelines. Without a centralized system, it’s harder to respond to findings, monitor for recurring issues, or maintain audit readiness.

Glean brings structure to the audit process by making assessment tools, past findings, and control documentation easy to access and apply. Banks gain efficiency, reduce repeat incidents, and strengthen their overall audit performance.

Wealth and investment management

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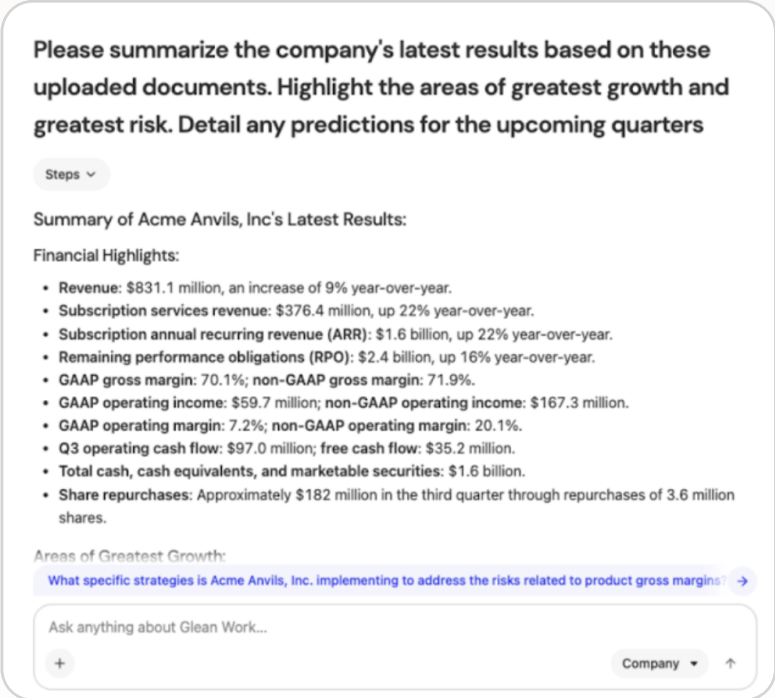


- Associates can ask questions in simple, natural language
- Answers are comprehensive, clear, and informative
- Results are delivered in plain language and can include guidance beyond just information
- Glean Agent can craft and share emails or other responses in the tone and style tailored to each customer
- Glean also suggests follow-up questions to help associates proactively deliver exceptional service

Corporate and investment banking

Deal teams spend too much time tracking down pitch materials, regulatory documentation, and market insights. Without a unified knowledge base, it's hard to build a complete picture of the client relationship or prepare for complex transactions. Inconsistent client coverage models and decentralized deal documentation lead to longer cycle times and missed opportunities.

Glean gives teams fast access to relevant materials – including internal research, client history, and compliance records. With a full view of every account, deal teams can collaborate more effectively, execute faster, and deliver better outcomes. Impact is measured in shorter deal cycles, higher win rates, stronger regulatory compliance, and increased wallet share.



- Search across files, folders, and uploaded financial docs
- Glean suggests smart follow-ups to deepen analysis
- Answers are clear, thorough, and include citations
- Glean can send summaries via email or chat
- Results auto-save to documents or folders

Markets

Trading desks operate under constant pressure, but key resources – from strategies to risk models to regulatory updates – are often hard to locate in the moment. Information spread across multiple platforms delays decisions and increases compliance risk. Post-trade processes are also slowed by fragmented audit and reporting systems.

By centralizing access to research, market data, trade history, and documentation, Glean supports faster, more informed trading. Teams can react quickly, stay compliant, and deliver a more personalized experience to clients. Firms report stronger trading performance, higher volumes, faster audit cycles, and reduced regulatory costs.

Risk management

Risk leaders need reliable access to credit models, operational risk data, and policy frameworks. But when documentation is stored across different systems and business lines, it's difficult to get a full risk picture quickly. That slows regulatory reporting and undermines confidence in decision-making.

Glean consolidates risk documentation into a single, structured view. With faster access to historical data and consistent processes across regions, teams can act on risk insights more effectively. Banks using Glean see improvements in risk-adjusted returns, credit loss reduction, and audit readiness – along with a stronger risk management culture overall.

Technology and operations

IT and operations teams often face gaps in documentation around system architecture, change management, cybersecurity, and vendor relationships. These gaps increase downtime, complicate transformation projects, and create risk in third-party management.

Glean brings that documentation together – giving teams visibility into past project outcomes, threat intelligence, and vendor records. The result is fewer delays, faster response times, and smoother technology deployments. Key metrics include shorter resolution cycles, improved vendor performance, and better cybersecurity posture.

Legal and compliance

Legal teams manage high volumes of precedents, filings, templates, and jurisdiction-specific regulations. Without centralized access, legal research and contract turnaround times can drag. Fragmented documentation also increases the risk of missed deadlines and inconsistent compliance.

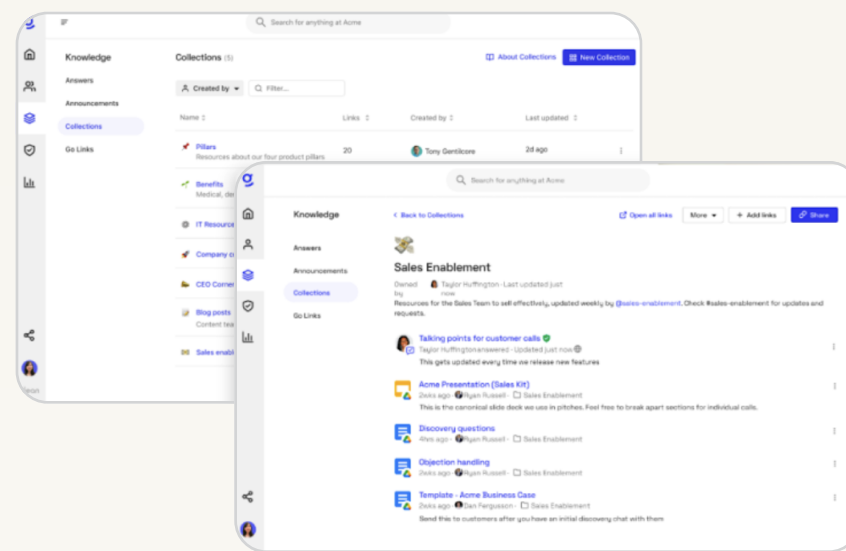
With Glean, legal and compliance professionals can quickly surface the right documents, track regulatory changes, and collaborate across teams. By improving visibility and standardizing workflows, Glean helps reduce time-to-resolution, minimize penalties, and improve data privacy and compliance outcomes.

Human resources

HR teams often manage different policies and processes across regions, making it difficult to deliver consistent employee experiences. Recruiting, onboarding, performance management, and training content are often buried in disconnected systems – slowing down progress and limiting engagement.

Glean gives HR a unified platform to organize and share critical information. Policies are easier to find, processes are easier to follow, and development content is easier to use. Results include faster hiring cycles, stronger employee retention and improved training completion.

Improving and accelerating onboarding



- HR can build all-in-one onboarding and training collections, combining docs and links across tools –so new hires have everything in one place
- Use Glean to create a self-service onboarding experience for new employees
- Help employees navigate system access, benefits, and more with ease

Finance and treasury

Finance teams juggle fragmented templates, regulatory filings, audit prep, capital planning models, and liquidity data. Without a centralized view, it's harder to forecast accurately, close quickly, or meet compliance deadlines.

Glean standardizes financial documentation and planning resources, providing secure access to everything from tax policies to historical data. This supports more accurate planning, faster closings, and more confident regulatory reporting. Impact is seen in improved forecasting, stronger capital and tax compliance, and more efficient audits.

Corporate strategy and business development

Strategy teams need a clear view of the market, the competitive landscape, and past M&A activity. But critical materials – from research and diligence files to partnership agreements – are often spread across business units. That fragmentation slows down execution and makes it harder to act on new opportunities.

Glean helps teams move faster by organizing market research, innovation roadmaps, and historical deal data in one place. Strategy leaders can track initiatives, analyze performance, and share insights more easily. The outcome: lower M&A transaction costs, faster time to decision, and stronger alignment across leadership.

Projecting financial outcomes with Glean

Investing in AI isn't just about capabilities – it's about outcomes. A commissioned Total Economic Impact™ (TEI) study by Forrester Consulting found that organizations using Glean saw a 141% return on investment over three years, with a net present value of \$15.6 million and a payback period of under six months.

Those gains were driven by three primary factors:

- Increased employee productivity: The study found that users saved up to 110 hours per year through faster search and task completion.
- Faster onboarding: New employees became productive 36 hours sooner on average.
- Reduced support demand: Internal teams saw a 20% drop in support requests as employees were able to self-serve more effectively.

For larger institutions, these savings scale quickly. For example, a bank with 100,000 knowledge workers could reclaim millions of hours annually – creating a potential productivity lift valued at over \$220 million per year. Similarly, accelerating onboarding across thousands of new hires can translate to faster time-to-value for talent and reduced ramp costs.

These figures offer a clear framework for modeling impact at scale – supporting both IT business cases and executive-level budgeting decisions.

Designed for the tools your teams already rely on

Technology only works when it fits into the flow of work. Glean is designed to integrate directly with the systems banks rely on every day – not replace them. It enhances existing tools and processes, making them easier to use and more effective across the organization.

With more than 100 pre-built connectors, Glean can index content from platforms like Microsoft 365, SharePoint, Jira, Salesforce, and others – while respecting every access control and permission in real time. Its API-first architecture also supports custom integrations, giving internal teams flexibility without added complexity.

Instead of requiring teams to build and maintain one-off connections, Glean serves as a secure, intelligent layer that brings context into the tools employees already use. The impact becomes clear in everyday scenarios.

For example, imagine a commercial relationship manager trying to answer a client's question about supply chain financing guidelines for mid-market manufacturers. Without Glean, the chatbot might point them to a general policy page on SharePoint – leaving them to dig through documents, emails, and training materials to piece together the right answer.

With Glean, that same question returns a complete, contextual response in seconds. The platform pulls the approved PDF from SharePoint, includes the legal team's email confirming the latest guidance, surfaces notes from a recent internal webinar, and highlights the go-to expert on that product. Instead of searching and second-guessing, the manager gets what they need to respond confidently – and move forward.

Fast time-to-value with a governance-first architecture

By providing access to relevant, up-to-date knowledge within the tools employees already use, Glean turns helpful technology into a true productivity driver. It not only reduces the time spent looking for answers, but also raises the quality of the decisions being made across the organization.

For banks, any new technology must deliver value quickly – without compromising on security, privacy, or regulatory standards. Glean is built to meet those expectations.

With more than 100 native connectors, the platform integrates directly into the systems banks already use. Most deployments begin delivering value within the first few weeks. There's no need for long professional services engagements or custom build-outs – banks can see results from pilot programs within a single quarter.

Glean's approach to large language models (LLMs) also simplifies governance. Rather than introducing a new, proprietary model, Glean supports those banks already have relationships with – including Azure OpenAI, Google Vertex AI, and Amazon Bedrock.

This brings two key advantages:

- Use your existing agreements. Banks can apply their current security, privacy, and data-handling protocols without needing to renegotiate or vet a new vendor.
- Stay flexible. Glean's LLM-agnostic design means there's no lock-in. As models evolve, banks can choose what works best for each use case.

This combination of fast integration and governance alignment allows banks to move quickly – without taking on unnecessary risk. Glean helps teams unlock measurable value in weeks, while staying fully compliant with institutional standards around data control, privacy, and procurement.

Enterprise-grade security and compliance

Security isn't an add-on – it's core to how Glean is built and deployed. The platform meets the most rigorous standards for data protection, access control, and regulatory compliance, making it a strong fit for the financial sector.

Secure by design

Glean uses a single-tenant architecture that keeps each bank's data fully isolated. For organizations that require maximum control, Glean also supports a cloud-prem deployment model. This allows the platform to run entirely within the bank's own cloud environment – ensuring data residency and enabling additional protections like VPC Service Controls.

Strict permissions enforcement

Glean mirrors the exact permissions of the underlying source systems, syncing in real time to ensure employees only see what they're authorized to access. Access Control Lists (ACLs) are continuously updated, maintaining alignment with internal policies across tools and teams.

To get more from AI, banks need more from their knowledge

No data retention with LLMs

When Glean connects to external LLMs such as Azure OpenAI, it operates on a zero-retention basis. No customer data is stored, cached, or used for model training. This safeguards sensitive information and ensures compliance with institutional privacy requirements.

Compliance built in

Glean is SOC 2 Type II certified and fully adheres to GDPR standards. All customer data is encrypted at rest using AES-256, and in transit using TLS 1.2 or higher. Sensitive credentials are protected with Google Cloud or AWS Key Management Services, with encryption keys rotated regularly. When a contract ends, all indexed data and customer instances are permanently deleted.

This approach gives banks the confidence to deploy Glean within highly regulated environments – without tradeoffs on performance, scalability, or speed to value.

Banks have already proven their leadership in adopting AI – driving measurable gains in productivity, efficiency, and client service. But the next phase of progress requires more than deploying new tools. It depends on connecting the knowledge that fuels them.

The vast majority of institutional knowledge remains siloed across systems, buried in documents, or locked behind permissions. That fragmentation limits decision-making, slows down operations, and holds back the full value of existing technology investments. Glean helps banks solve that problem – not by replacing current tools, but by making them more useful, more secure, and more connected.

By creating a unified, intelligent layer over the enterprise tech stack, Glean delivers:

- Quantifiable financial impact: A projected 141% ROI over three years, with the potential to reclaim over \$220 million in annual productivity from faster search and smarter workflows
- Faster, governed deployment: A model-agnostic approach that leverages existing LLM agreements and fits seamlessly into cloud-prem environments
- Stronger return on existing investments: The ability to extend the value of internal assistants, chatbots, and productivity tools without starting from scratch
- Enterprise-grade security: A single-tenant, permissions-aware architecture built to meet banking's strictest requirements around privacy and compliance

Glean is not another standalone AI solution. It's the connective layer that turns disconnected data into real intelligence – helping banks unlock more from every employee, every decision, and every system already in place.

Ready to see how Glean can help your teams work smarter and move faster? [Request a demo today.](#)