CASE STUDY

MANAGED AI

A financial services group builds a governed AI adoption engine.

A South African financial services group wanted the benefit of AI across investment banking, corporate finance, securities.

MANAGED AI / FINANCIAL SERVICES GROUP / SOUTH AFRICA

AT A GLANCE

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Governed adoption model replacing fragmented departmental experimentation	Finance-specific agents live: valuation, research, compliance, reporting and knowledge	Shadow AI risk as teams moved from public tools to an approved environment

A South African financial services group wanted the benefit of AI across investment banking, corporate finance, securities, compliance and reporting without loosening its grip on governance. Numata replaced fragmented experimentation with a managed adoption model: executive alignment, secure onboarding, AI Champions, departmental workshops and finance-specific agents.

THE CHALLENGE

Interest in AI was growing faster than the controls around it. Employees were exploring public tools independently, usage differed by department, and leadership had little central visibility into what was being used or on what information. In a business handling sensitive financial data, the exposure created by uncontrolled AI use mattered as much as the opportunity. What the group needed was not access to AI technology, but a managed adoption framework balancing innovation, governance, security, enablement and business value.

OUR APPROACH

01 Started with executive alignment: strategic opportunities, governance expectations and the adoption priorities leadership would stand behind.

02 Onboarded users into a governed AI environment mapped to the group's own security and compliance requirements.

03 Enabled departmental AI Champions to carry good practice into their teams and build internal momentum.

04 Ran role-specific workshops anchored in real finance workflows rather than generic AI awareness training.

05 Built specialist agents around the work: research, compliance knowledge, reporting, valuation preparation and knowledge retrieval.

WHAT WE DELIVERED

- Managed AI service covering governance, secure onboarding, enablement, agent build and ongoing optimisation.
- Valuation support agent assisting structured preparation for DCF, LBO and comparable company analysis.
- Research and market intelligence agent to locate, summarise and structure research inputs for review.
- Compliance support agent giving controlled access to policy and compliance knowledge so teams work from approved information.
- Reporting assistant for repeatable management, committee and client reporting drawn from governed business context.
- Knowledge retrieval assistant across internal templates, reference material and institutional knowledge.
- AI Champions network and departmental workshop programme, with a repeatable model for future use-case expansion.

> “We wanted the upside of AI without losing control of our information. The programme gave us an operating model our compliance team could actually defend.”
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WHAT WE TOOK FROM IT

01 AI is an organisational capability, not a technology project. It has to be governed, enabled, measured and improved like any other service.

02 Governance earns adoption. Once teams knew which environment was approved, the pull towards public tools fell away.

03 Workshops that start from a department's own workflow move people into everyday use. Generic AI training does not.

ABOUT NUMATA

Numata is a business technology services and solutions provider for small and mid-sized enterprises. We align technology to business outcomes across IT strategy, cyber, data, operations, modern work and AI, delivered through NumataOne™, our strategy enablement framework.

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