

Whatfix Powers GenAI-Driven Digital Transformation Across the Global Financial Services Sector

Category: Business

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- Deepens Focus on Financial Services, anchored on proven results, dedicated vertical team, and AI-powered product suite.
- Trusted by the world's leading financial services institutions such as Sentry Insurance, Grant Thornton, Mizuho, Ria Financial Services, Mountain America Credit Union, ICICI Bank Limited, Old Mutual, Encova Insurance, and Select Health

[Whatfix](#), the global leader in Digital Adoption Platforms (DAP), is accelerating transformation across the global financial services sector with its proprietary GenAI-powered product suite. As financial services institutions worldwide face mounting regulatory pressures, legacy modernization challenges, and rising user expectations, Whatfix is empowering them to navigate change with agility and control, while driving measurable improvements in productivity and ROI.

Only 58% of banking leaders feel confident in their ability to modernize core systems, according to Bain & Company's 2024 Banking Trends Survey. While 43% cite investing in new technologies as a top priority, the primary focus for bank CIOs over the next 12 months is managing cybersecurity and technology risks. These indicators underscore the complexity of digital transformation in financial services and the

growing need for scalable, secure, and user-focused solutions.

Whatfix directly addresses these challenges through its product suite, comprising three powerful tools: Digital adoption to enable users right within any software, no-code analytics to uncover and resolve adoption gaps, and application simulation for safe, hands-on learning in software replicas, all powered by GenAI.

*"In financial services institutions, where accuracy, speed, and compliance are non-negotiable, Whatfix empowers these institutions to transform with confidence," said **Khadim Batti, CEO and Co-founder of Whatfix.** "We believe userization-putting users at the center of transformation-is the key to real change. Our GenAI-led platform is delivering this across some of the world's most demanding financial environments."*

GenAI-Led Enablement at Scale

Top financial services institutions across 40+ countries globally trust Whatfix's AI-powered product suite to scale digital transformation. Whatfix empowers financial services institutions by embedding real-time, contextual guidance within mission-critical platforms such as core banking systems, insurance policy and claims management software, wealth management platforms, loan origination systems, investment advisory portals, CRM, customer tools, and compliance systems.

As the industry evolves, Whatfix is enabling users to complete tasks faster, smarter, and with less friction. Whatfix's GenAI capabilities are integrated across the entire user journey, from transformation planning to in-flow enablement and ongoing progression. Whatfix's proprietary GenAI agents power intelligent content creation, insight generation, and adaptive user support, delivering personalized experiences and driving consistent execution at scale.

With AI as a multiplier, Whatfix is laying the foundation for

a system of intelligence and action, empowering financial services institutions to go beyond fragmented point tools and toward unified, intelligent execution that delivers real results.

Use cases span:

- Standardized execution of critical workflows, including KYC reviews, anti-money laundering (AML) checks, and internal controls
- Regulatory-readiness for mandates such as SWIFT ISO 20022, Basel III, and local jurisdictional reporting
- Rapid deployment of policy or regulatory changes, including credit underwriting policies, interest rate adjustments, and product suitability guidelines
- Accelerated onboarding of relationship managers, credit analysts, and loan officers, reducing time-to-productivity across corporate banking operations
- Role-based, self-guided training programs for geographically distributed and multilingual teams
- Enhance customer experience across the customer portal, making the experience smooth, agile, and rewarding.

Redefining Results for Financial Services Institutions

Over 75% of our financial services customers are large enterprises and Fortune 500 leaders who rely on Whatfix to accelerate transformation, drive adoption, and reduce risk at scale.

Whatfix has empowered financial institutions to achieve as high as:

- 84% reduction in onboarding and training time for digital and payment platforms

- \$1,000,000 in annual cost savings through improved compliance and self-service
- 10X ROI from growth in loan processing and operational efficiency
- 88% user self-sufficiency, resulting in a
- 45-60% reduction in support queries and
- 50% boost in user productivity

Leading financial institutions are already seeing impact:

Colleen Behnke, Learning and Performance Specialist at [Sentry Insurance](#), says, *"Although the Workday DAP by Whatfix has only been live for a few months, we're achieving 94% user engagement and 91% self help search success. This accelerated proficiency ensures we capitalize faster on the great Workday attributes: employee engagement, streamlined people processes, and improved collaboration across the organization."*

"We were evaluating other DAP vendors, but the engagement with Whatfix was unreal-we just hit it off," said **Hein Pieters**, Head of Adviser Solutions at [Old Mutual](#). *"The willingness of the people at Whatfix to come together and make it work was a difference-maker."*

"I've been in charge of Whatfix at my company for two years, and their customer service is unmatched," said **Michelle Warsing**, Senior Instructional Designer at a leading U.S.-based financial services firm. *"I appreciate the ease of use and the support we receive when implementing new applications."*

Powering Vertical Growth with Strategy and GenAI

In 2020, Whatfix launched its industry strategy with insurance, one of the most complex and regulated sectors. Over the next four years, the company achieved 80% year-over-year growth in new customer logos, reflecting strong and sustained

demand. This momentum translated into a Net Revenue Retention (NRR) of 112% in 2025, underscoring consistent customer expansion and long-term value. Building on this success and rising enterprise demand across North America and EMEA, Whatfix expanded its financial services footprint to include banking, lending, and wealth management. In parallel, the company deepened its presence in the public sector, life sciences, and pharma industries, accelerating digital transformation at scale.

Today, Whatfix is at the forefront of an industry-first go-to-market strategy, led by Vipul Gupta, Head of Revenue Operations and Industry Strategy. A long-time Whatfix leader, Vipul began his journey as Director of Digital Marketing and went on to lead global marketing. As a data-driven, tech-focused leader, he now drives the company's global revenue operations and vertical strategy.

To further support enterprise transformation, Whatfix recently introduced a suite of GenAI Agents designed to drive digital as well as AI adoption in the flow of work. The company's market leadership continues to be validated by top-tier analyst recognitions across Gartner, Forrester, IDC, and Everest Group reports on DAP and Product Analytics.

About Whatfix

Whatfix is advancing the **"userization"** of application technology, by empowering companies to maximize the ROI of digital investments across the application lifecycle. Powered by GenAI, Whatfix's product suite includes a digital adoption platform, simulated application environments for hands-on training, and no-code application analytics. Whatfix enables organizations to drive user productivity, ensure process compliance, and improve user experience of internal and customer-facing applications. With seven offices across the US, India, UK, Germany, Singapore, and Australia, Whatfix supports 700+ enterprises, including 80+ Fortune 500s like Shell, Schneider Electric, and UPS Supply Chain Solutions.

Backed by investors such as Warburg Pincus, Softbank Vision Fund 2, Dragoneer, Peak XV Partners, Eight Roads, and Cisco Investments, software clicks with Whatfix.

For more information, visit the [Whatfix](#) website.

