Seismic

REPORT

The New **Go-to-Market Standard** for Financial Services

Why trusted intelligence, human judgment, and consistent execution create a competitive advantage in financial services.

2026

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AT A GLANCE

What financial services firms need to win today

AI has made information abundant but hasn't made decisions easier. When AI-generated content conflicts with human guidance, 76% of financial services respondents trust the human. For financial services leaders, it's never been more important to equip client-facing professionals to interpret information, explain its relevance, and guide the client's next decision.

This report examines what financial services leaders value when buying technology and what the findings mean for supporting their own client-facing teams.

The findings point to four capabilities:



Clear ownership of AI-enabled content.

One team or leader must be accountable for its accuracy, governance, and use.



Connected systems and an authoritative source of truth.

Client-facing professionals need current, consistent information and a clear record when systems disagree.



Governance and approval controls for client-facing content.

Firms need safeguards that prevent unapproved or unreliable content from reaching clients.



A business case teams can defend.

Individuals must be able to quantify value, explain assumptions, and respond to scrutiny in the moment.

Together, these capabilities make trusted client-facing professionals' performance **repeatable.**

Source: NewtonX survey of 200 C-level and senior leaders in North America and Northern EMEA who evaluate, approve, manage, or fund revenue technology, fielded July 20–30, 2026. Financial services (FS) respondents, n=59. FS figures are descriptive. They reflect FS technology buyers, not a survey of their clients.

INTRODUCTION

How AI has raised the standard

AI is changing how financial services firms access information, prepare for conversations, and engage clients. Financial services leaders need to turn this access into better decisions, stronger relationships, and measurable growth — with accountability for what reaches the client.

The New Go-to-Market Standard for Financial Services examines what financial services leaders value when buying technology and what those findings mean for supporting their own client-facing teams. Seismic commissioned the research to understand how AI is reshaping trust and decision-making, where human expertise adds the greatest value, and how organizations can equip their people to turn information into informed action.

Conducted by NewtonX, the study draws on 200 C-level and senior leaders, including 59 financial services respondents. It considers their perspectives as technology buyers and leaders responsible for supporting client-facing teams. The findings reflect these leaders' experiences and expectations, rather than a survey of their clients.

The research reveals an important distinction: while 85% of financial services respondents say AI makes information faster and easier to access, **76% trust human guidance more when it conflicts with AI-generated content**. As information becomes more accessible, expertise, context, and accountability remain essential to confident decisions.

For executives, the report offers practical priorities for making strong professional judgment a capability across the firm. These include connecting systems and trusted information, assigning clear ownership of AI-enabled content, embedding governance into everyday work, and helping client-facing professionals translate insight into timely, relevant action. Together, these priorities provide a foundation for more consistent execution, stronger client experiences, and relationship-led growth.

About the research

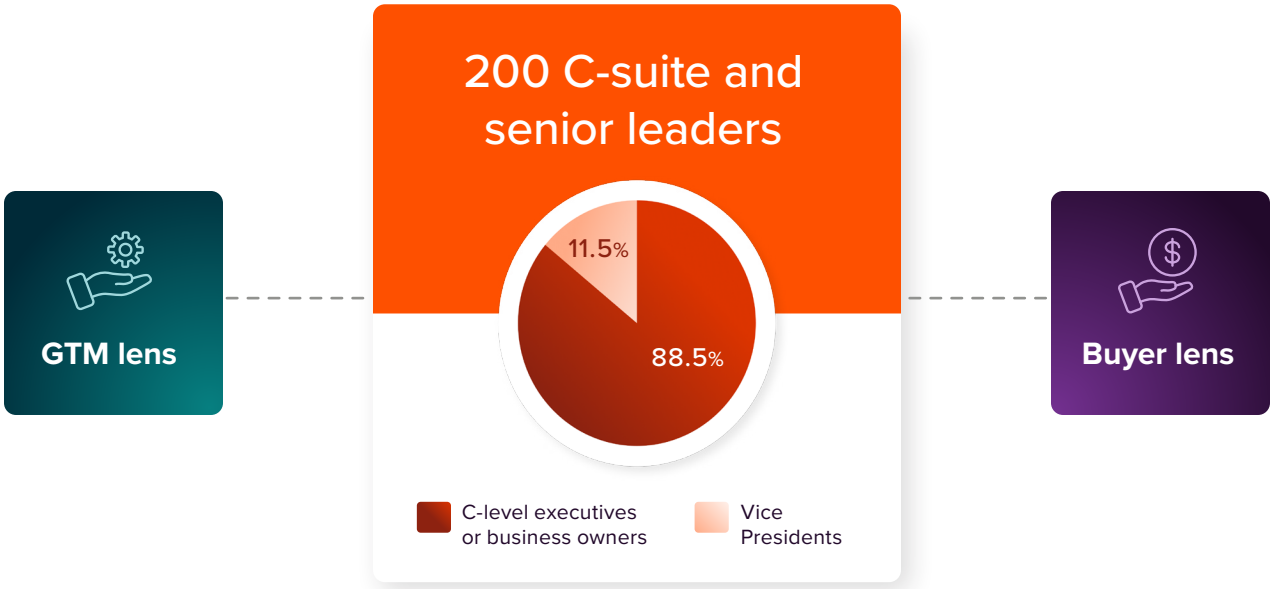
NewtonX conducted original research with 200 C-level and senior leaders across North America and Northern EMEA who evaluate, approve, manage, or fund revenue technology.

The study asked the same leaders to consider enterprise selling from both sides of the decision: how they evaluate technology purchases and how their organizations equip customer-facing teams.

This financial services edition draws on the **59 FS respondents within the overall sample**. Findings reflect their perspectives as technology buyers and GTM leaders, not a survey of their clients. Percentages are rounded, and comparisons with the overall sample are descriptive.

In this report, go-to-market (GTM) refers to the connected work of marketing, sales, enablement, revenue operations, customer success, and IT across the customer lifecycle.

The survey fielded from July 20 to July 30, 2026. Eight AI-moderated interviews and six in-depth executive interviews added context to the overall study.



NewtonX®

About the research partner

NewtonX is a B2B research intelligence company. It connects organizations with verified professionals and supports end-to-end research using traceable data across more than 140 industries.

GTM LENS

Information failures reach the professional, then the client

A client-facing professional can only bring credible judgment into the room when the information behind it is up to date, governed, and relevant to the individual client circumstance.

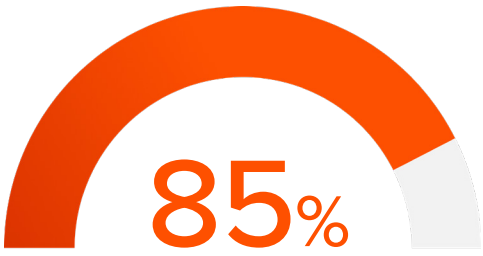
AI makes information faster, not more reliable

AI carries the quality of its sources into every output. But when these sources conflict, client-facing professionals inherit the risk.

Eighty-five percent of financial services respondents agree that AI has made it quicker and easier to access information for revenue decisions. But this doesn't guarantee the information is reliable. When systems disagree, AI can deliver the wrong answer with the polish of approved work, and the client-facing professional delivering it can put the firm at risk.

These weaknesses can carry through into client-facing materials.

More than eight in ten financial services respondents say unapproved or ungoverned AI-generated content has reached customers at least once in the past year, and 36% say it happens a few times a year or more.



report unapproved or ungoverned AI-generated content reaching customers at least once in the past year, including once or twice.

Base: FS respondents, n=59.
Includes once or twice in the past year.

The client-facing professional often becomes the last person in the chain. They receive an answer, proposal, or recommendation that looks ready to use, then carry its accuracy into the client conversation.

> **"The majority of the time, [the cause of accuracy or consistency problems related to AI generated content] is data quality. There isn't a single source of truth. We have several data points that contradict each other, so depending on which core systems the AI can access, we get different answers. Maybe 90% of the time it's a data-related issue, not a functionality or prompting problem."**
>
> *— Group COO, Financial Services*

GTM LENS

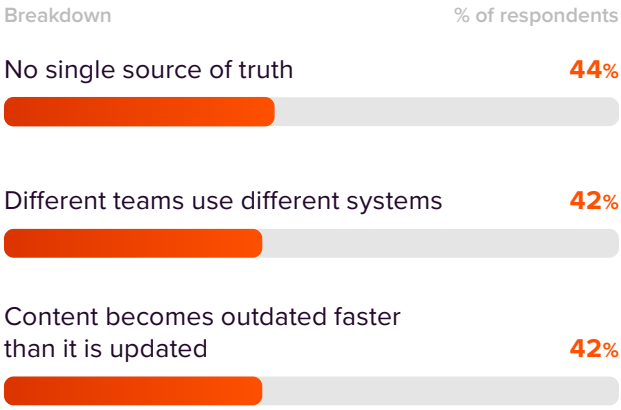
Fragmented systems create compounding costs

When systems disagree, AI turns an internal information problem into rework for the firm and risk for the client.

Without a single source of truth, different teams work from different systems, and content changes faster than teams can update it. Professionals working within these systems risk delivering outdated or inaccurate information to clients. They might receive a confident AI answer without seeing the old record, conflicting source, or missing context underneath it.

One executive described an AI sales workflow that used stale CRM and engagement data to recommend the next best action on a client account. The recommendation looked credible, yet it directed the team toward the wrong stakeholder with the wrong message. The team caught the error before losing the opportunity, but the correction slowed the sales cycle.

Where responsibility for content accuracy breaks down



Base: FS respondents, n=59. Multiple responses allowed. Selected responses shown.

> **"It's just a vast array of different systems that hold similar, or non-similar, data, and that creates these errors. We're working hard to minimize duplication of data across different stages, but it's very difficult when you're not a startup starting from a blank slate."**
>
> *— Head of Technology, Financial Services*

GTM LENS

Accuracy needs an owner before information reaches the client-facing professional

Connected systems make information available. Clear ownership determines what the professionals can trust.

Technology can't be the deciding factor for which source is used when systems disagree. Financial services leaders need to establish where approved information lives, who maintains it, and who carries responsibility for client-facing AI output.

A strong foundation of governance ensures that a member of the firm can approve, correct, or stop an output before a client-facing professional uses it. Clear ownership and governed sources give client-facing professionals a firm basis for guiding the client.



of financial services respondents agree that clear content ownership and connected systems help organizations make purchase decisions faster.

Base: FS respondents, n=59.
Somewhat/strongly agree combined.

Actions for GTM leaders

Assign one named owner for the accuracy of client-facing AI output.

Make clear who maintains the information, approves changes, and resolves errors.

Decide which source is authoritative when systems disagree.

Give teams a clear way to identify current, approved information and resolve conflicting answers.

Build human review and approval into client-facing workflows.

Define which materials require review, who approves them, and how professionals can personalize and share content within the firm's controls.

BUYER LENS

Client-facing professionals earn their place through judgment

We asked financial services leaders about their own technology purchases. The same dynamics likely shape how their clients see client-facing professionals. Clients are likely to trust client-facing professionals who bring context and judgment to the decision, apply it to their unique situation, and stand behind the recommendation with confidence.

Financial services leaders still rely on people, not AI, for context and accountability

Human guidance matters most when it comes to a firm's own client-facing teams. They need accountability, interpretation, and a recommendation for a specific situation. AI and self-service research have changed what clients expect before the first conversation. They can compare products, review providers, check fee benchmarks, and form an initial view without speaking to a client-facing professional.

This access has increased the value of strong human relationships for many financial services respondents. Forty-seven percent say AI-generated content and information have made them more reliant on human relationships in high-stakes decisions, while 25% have become less reliant. Among those who have become more reliant, 36% identify the accountability a trusted relationship provides as their main reason. These respondents still want someone to stand behind the recommendation when the decision carries consequences.



of financial services respondents trust human guidance more when it conflicts with AI-generated content.

Clients trust professionals who can explain why an answer applies to their individual situation, acknowledge uncertainty, and take responsibility for the recommendation.

BUYER LENS

Financial services leaders need individuals to turn information into a decision

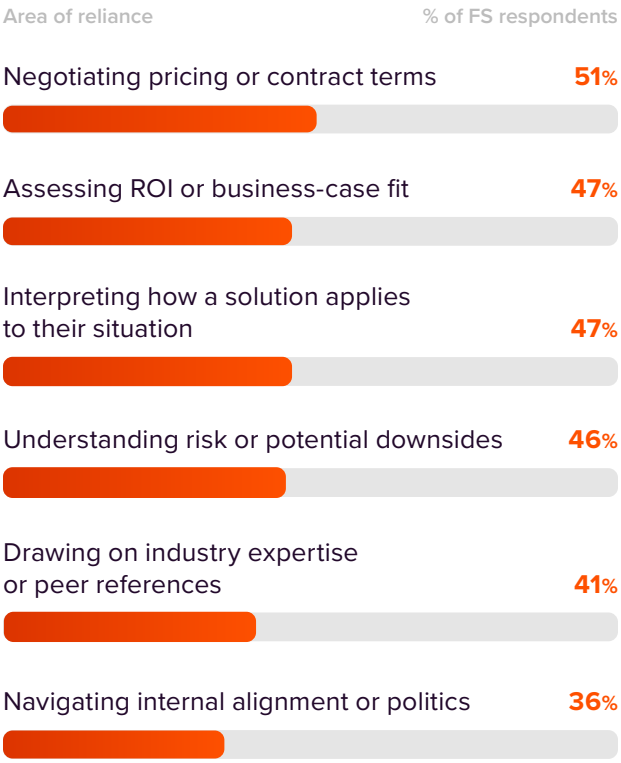
Financial services respondents still rely on vendor representatives and human experts across the hardest parts of a technology purchase. Negotiating pricing and contract terms ranks first, followed by assessing business-case fit and interpreting how a solution applies to their situation.

The pattern extends well beyond price. Clients want a client-facing professional who can connect the economics, risks, and technical realities of a financial decision to the client's situation, and explain what it means for the relationship.

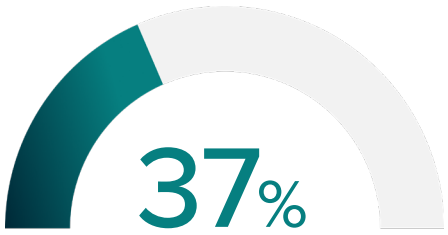
An AI answer may be accurate in general and still fail in a client's specific circumstances. In financial services, where relationships depend on trust and accountability, the client-facing professional earns trust by recognizing that distinction and stopping a flawed recommendation before it reaches the client.

The client-facing professional's role goes beyond adding information. When priorities change or a question reveals a deeper concern, clients need help interpreting what they have found, challenging assumptions, and understanding how a solution applies to their situation. That is where expertise, context, and judgment earn their value. One executive described the change in the job as fending off recommendations that hold up in theory but fail against their actual circumstances, and saying so plainly.

Where financial services respondents still rely on a vendor representative or human expert



Base: FS respondents, n=59. Multiple responses allowed. Selected responses shown.



37%

rely on a vendor representative or human expert to validate claims they encountered elsewhere.

CONCLUSION

Turn trusted intelligence into better client outcomes

Gaining a competitive advantage in financial services now depends on how well firms turn trusted intelligence into informed decisions, relevant conversations, and consistent execution across the organization.

Our research shows that AI hasn't replaced the need for human expertise. Clients need professionals who can make sense of complex situations, apply what they know to the client's circumstances, and stand behind their advice. Firms, in turn, need to deliver that expertise consistently, with the speed, oversight, and accountability the market now expects.

Four priorities will set the new standard:

1. **Establish trust at the source.**
   Give professionals information they can rely on, with clear ownership and strong governance, so they can talk with clients confidently.

2. **Make expertise repeatable.**
   Give every client-facing professional the knowledge, context, guidance, and coaching they need to use good judgment when it matters most.

3. **Turn intelligence into timely action.**
   Connect insights, approved content, and workflows so professionals can spot client needs early and act decisively and with relevant insights.

4. **Measure what matters.**
   Look beyond AI usage and productivity. Track how behaviors impact client engagement, relationship strength, retention, team capacity, and business growth.

The new GTM standard is about helping client-facing professionals share the right expertise, take the right action, and earn client trust every day. Leading firms will align their people, processes, intelligence, and governance around the moments that shape client decisions and relationships. This way, they can turn better execution into stronger relationships and more durable growth.

About Seismic

Seismic is the Go-To-Market Performance company, driving how organizations turn their strategy into revenue. Seismic brings together signals from customer conversations, buyer engagement, governed content, coaching and seller behavior to turn intelligence into winning action. Through its AI revenue execution platform, the company equips customer-facing teams with the insights, governance, and contextual guidance they need to execute with confidence and deliver measurable business outcomes. Trusted by 2,500 organizations and over 3.5 million users around the globe, Seismic is headquartered in San Diego with offices across North America, Europe and Asia-Pacific.

To learn more, visit **Seismic.com.**

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