

The ProSight Human+AI Transformation Collective

Banking executives shaping the workforce of the future — and delivering value to the industry at large.

ProSight Financial Association's inaugural Human + AI program connects banking executives who are personally accountable for leading their institution's AI workforce transformation. A place to learn from expert industry practitioners, share challenges and lessons learned with true peers, and work together to create tools and resources that benefit the banking industry at large.

The Collective brings together a curated group of 10-15 C-suite executives — spanning Human Resources, Technology, Risk & Compliance, Customer Experience, Data & Analytics, Operations, and P&L ownership — for a nine-month program combining in-person and virtual sessions, external readings, hands-on workshops, and an ongoing virtual connection space.

10 - 15

Founding Members

9 mos.

Oct. 2026 – June 2027

Fall '26

Target Launch

\$15K

Inaugural Price / Member

Built for Bankers, by Bankers

The Collective is closed-door, banking-specific, and grounded in practical application — not another industry-agnostic research download or vendor-driven webinar series. It addresses the specific gaps bankers have told us they can't find elsewhere:

- ✓ In-depth focus on the people, team, and culture questions
- ✓ Realistic ROI analysis and budget-planning guidance, applicable to our industry
- ✓ Considerations and impacts for financial brands, customers, and members
- ✓ Practical applications and use cases, framed around the right benchmarks for each banking function
- ✓ Honest answers about failures, pivots, and unmet challenges — and unexpected benefits

Why the Collective

Practitioner-Led: Guided by hands-on AI transformation practitioners with executive-level banking experience.

Structured Cadence: Momentum sustained over a defined nine-month arc, not a single event.

Industry-Specific: Informed by cross-industry trends and best practices but tailored to the needs of bankers.

Real-World Application: Curriculum and projects built around each institution's actual AI adoption challenges.

Priced for Adoption: Program delivers high-quality content and differentiated value while remaining accessible to all FIs.

Why ProSight

ProSight and its legacy organizations, BAI & RMA, have spent decades leading closed-door executive roundtables, defining the governance frameworks banks use to satisfy examiners, and stewarding valuable financial performance benchmark data. That heritage of institutional trust, paired with a non-profit structure free of commercial conflicts, uniquely positions ProSight to convene this conversation.

Curriculum At A Glance

The curriculum is organized into 13 units across four chapters. Cohort members move from establishing a shared, honest AI baseline, into open discussion of today's successes and challenges, envisioning what must be so to transform the workforce, and finally closing with a concrete, board-ready measurement framework.

Throughout the cohort journey, the program's center of gravity stays focused squarely on the human aspects of banking operations and workforce transformation – culture, roles, leadership, and change – not generic AI technology adoption.

CHAPTER 1	BASELINE Establishing the opportunity
CHAPTER 2	FOUNDATION Human + AI transformation in process
CHAPTER 3	ASPIRATION Envisioning the ideal workforce
CHAPTER 4	EXECUTION Leading & measuring performance

The Nine-Month Journey

October	November-December	January-February	March-April	May-June
Welcome & Voice of Cohort Members	Chapter 1: Baseline Includes On-Site Session	Chapter 2: Foundation	Chapter 3: Aspiration Includes On-Site Session	Chapter 4: Execution Includes On-Site Session

Sample Topics

- ✔ Understanding where your FI sits on the AI Adoption curve (Novice, Experimenting, Practicing, Proficient)
- ✔ Measurement, ownership, and governance pitfalls – why projects fail to achieve traditional ROI goals
- ✔ Handling the big questions: culture, ethics & bias, brand impacts, conscientious objectors
- ✔ Practical applications and use cases, framed around the right benchmarks for each banking function
- ✔ Budgeting, staffing, and the new labor economics – measuring what matters most

Capstone Project: Advancing the Industry

The inaugural cohort will co-create the first Human + AI Banking Benchmarking Taxonomy. A peer-sourced framework defining the new ROI and team-performance metrics that matter most when assessing AI's impact on the banking workforce and the bottom line.

Hands-on workshops, held each month, give participants the opportunity to collaborate, design, and build with others representing different functional disciplines, translating their learnings and diverse experience into execution.

Shared more broadly at the end of the program, the benchmarking taxonomy is designed as a living asset that future cohorts will extend and refine, directly seeding ProSight's forthcoming AI Performance Benchmarking Suite for bankers.

This artifact is intended to become the definitive benchmarking framework for banking, affording Collective members the opportunity to advance the industry in this important are.

Faculty & Facilitation

ProSight has built a strategically selected team of expert facilitators, faculty, and guest speakers — practitioners with decades of experience leading financial institutions through technology-driven transformation, each combining deep banking industry experience with hands-on AI transformation and innovation expertise.

Lindsay Soergel

Executive Program Advisor — Founder & Principal, Apple PIE Consulting

Lindsay is an accomplished technology strategist and CX delivery executive with 25+ years of product design and go-to-market experience in banking, fintech, and global financial services, augmented by extensive expertise in cross-industry AI workforce design, virtual community-building, and data-driven marketing. While CEO at Fintilect, her team partnered with coding and QA agents to re-build, test, and document an online banking platform. As Chief Product, Marketing, and CX Officer at Kasisto AI, Lindsay's team built the first LLM purpose-built for banking. She led global product strategy and marketing for NCR's financial services division, and at SunTrust Bank (now Truist), she owned the Retail Bank technology portfolio and cross-bank customer experience. At PNC Bank, Lindsay's team built the PNC Virtual Wallet and many other digital banking firsts.

Tarrah Palomino

Program Faculty Leader & Executive Facilitator — CEO, Papilio Collective

Tarrah has spent thirty years leading innovation at scale. She founded Papilio Collective to help organizations lead great transformations across people, process, and technology, with AI increasingly at the center of that work. Before founding Papilio Collective, Tarrah spent nearly twenty years in financial services. At NCR, she led Product Strategy for NCR Digital Banking, supporting more than 600 financial institutions and over 53 million users nationwide — curating the content and experiences for NCR's Innovation Labs, Executive Steering Councils, and Retail and Business Banking Client Advisory Councils, work that speaks directly to what this cohort's participants live every day.

Alexiss Abad-Paulson

Curriculum Coordinator — Transformation Practice Leader, Papilio Collective

Alexiss has spent twenty years in financial services guiding and facilitating change discussions, building the frameworks and content structures that give a program like this one its intellectual backbone. Alongside her work in financial services, Alexiss, together with Tarrah, also led complex facilitation work supporting the State of California on one of the largest healthcare projects in U.S. history — bringing together hundreds of people every quarter to drive the creativity that change of that scale required. A recurring cadence, a large and diverse group, and a shared project that holds together because people show up ready to be candid: exactly what this cohort will ask of its participants.

Our speaker line-up also includes futurists, technologists, data scientists, and financial services executives — each bringing relevant workforce performance and AI expertise to the cohort.