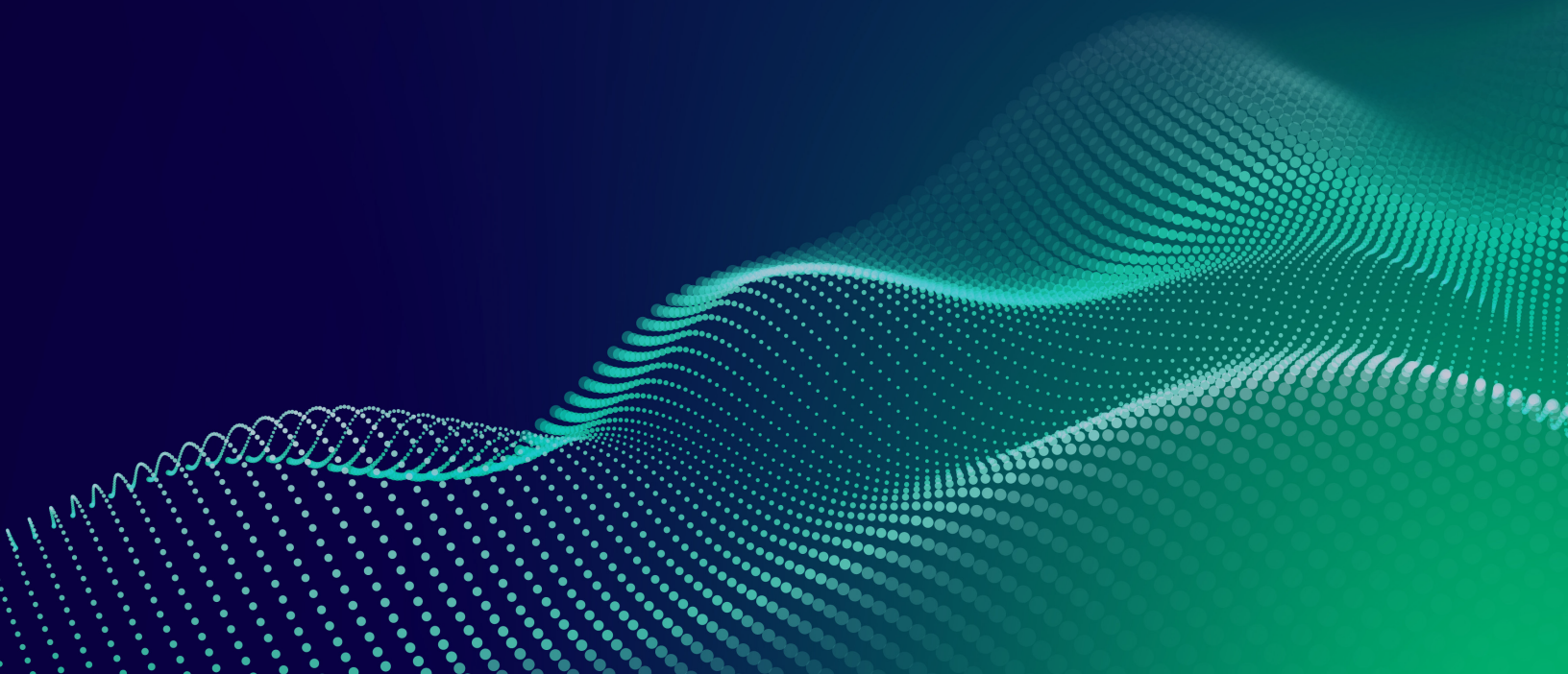


THE PROSIGHT HUMAN+AI TRANSFORMATION COLLECTIVE

Building the Human+AI banking workforce

A year of candid work with peer institutions on where AI stands today,
what it changes for your people, and how to measure what matters.



Most institutions are measuring AI by how much it gets used.

The harder question is how the work has changed.

Over nine months, this collective works through that question together. We start with an honest baseline, move into culture, roles, and governance, look ahead to the workforce you want to build, and finish with how to measure it and present it to your board.

The value of the room is the candor in it. Every member brings real experience, including what did not work, and leaves with a clearer picture of where their institution stands.

WHAT THE COLLECTIVE BUILDS

The AI Banking Benchmarking Taxonomy: a shared set of use cases, metrics, and ROI measures for Human + AI banking teams. The collective presents it at the final on-site session, and it becomes a living resource future collectives extend.

HOW THE YEAR WORKS

Theme Sessions	Thirteen sessions, each on one topic in depth. Most are virtual. Some include a guest speaker.
Project Studio	Five working sessions on the taxonomy and the collective’s capstone project.
On-Site Days	November, March, and June. Each pairs a morning theme with afternoon project work.

Seventeen sessions in four chapters

Three sessions bring the collective together in person. Exact dates follow in your calendar invitations.

CHAPTER 01			Baseline
01	October	Virtual	Kick-off: introductions and expectations
02	November, early	On-site	Where we stand: setting the AI baseline
03	November, later	Virtual	From pilots to production: the ROI of AI
04	December, early	Virtual	Adoption vs. adaptation
05	December, mid	Virtual	Project Studio 2: capstone checkpoint 1
CHAPTER 02			Foundation
06	January, early	TBD	Cultural impacts: organization, roles, and communication
07	January, later	Virtual	Workflows and job descriptions
08	February, early	Virtual	Project Studio 3: capstone checkpoint 2
09	February, later	Virtual	Where AI governance and performance ownership live
CHAPTER 03			Aspiration
10	March, early	Virtual	AI and your brand: trust on the front line
11	March, later	On-site	The harder questions
12	April, early	Virtual	Leading and communicating through the change
13	April, later	Virtual	The labor economics of Human + AI teams
CHAPTER 04			Execution
14	May, early	Virtual	Measuring what matters: KPIs, ROI, and the taxonomy
15	May, later	Virtual	Project Studio 5: taxonomy refinement
16	June, early	Virtual	The board conversation
17	June, later	On-site	Closing the loop and capstone presentations

Baseline: establishing the opportunity

We begin with where each institution stands today, what its pilots have returned, and how to tell real maturity from usage.

October Virtual <i>90 minutes</i>	KICK-OFF Introductions and expectations The collective meets for the first time. Each member shares what their institution wants from the year, and together we agree on what success looks like.
November, early On-site 8AM to 3PM CT <i>Dinner to follow</i>	THEME 01 • MORNING Where we stand: setting the AI baseline Each member names where their institution stands with AI today, separating what is deployed from what is still planned. Using a four-stage AI sophistication curve, you assess where your teams have advanced, stalled, or slipped back. The result is an honest shared starting point, and it sets the tone for the year: candor over posture.
	PROJECT STUDIO 1 OF 5 • AFTERNOON Charter the collective's flagship project, agree its scope, and assign contributors.
November, later Virtual	THEME 02 From pilots to production: the ROI of AI Members share the AI pilots they have run: what worked, where they hit obstacles, and what the return looked like once measured, or whether it could be measured at all. Nearly every institution has a pilot that did not go to plan, and those stories carry the most useful lessons. The use cases shared here feed the collective's benchmarking taxonomy.
December, early Virtual	THEME 03 Adoption vs. adaptation: why usage volume is not maturity Most institutions treat AI usage volume as a measure of maturity. This session asks the better question: how has the work itself changed? We look at how rewarding volume can raise cost and lower productivity. A guest speaker from Section AI shares cross-industry data showing the pattern reaches well beyond banking. The distinction becomes a reference point for the rest of the year.
December, mid Virtual	PROJECT STUDIO 2 OF 5 Capstone project checkpoint 1

Foundation: Human+AI change in practice

With a baseline in place, the collective turns to people: culture, roles, workflows, and who owns AI governance and performance.

THEME 04

January

Format to be confirmed

Cultural impacts: organization, roles, and communication

AI is changing team culture, organizational structure, and how information moves between roles. That includes an honest conversation about roles that are shrinking or going away. We look at reskilling: when it is needed, and which kinds of AI training improve performance. The discussion moves from individual pilots into the more personal questions of organizational identity and brand.

THEME 05

January, later

Virtual

Workflows and job descriptions: data, humans, and AI

This session gets concrete. How do you rewrite a workflow, and what does a job description look like when one of your teammates is an AI agent? We cover how data curation roles change shape alongside human ones. You leave with a starting template to adapt at your own institution.

February, early

Virtual

PROJECT STUDIO 3 OF 5

Capstone project checkpoint 2

THEME 06

February, later

Virtual

Where AI governance and performance ownership live

Every institution is working through the same question: who in the org chart owns AI governance, and how is that different from owning Human + AI performance? We cover model risk management and examiner expectations, grounding the collective's work in regulatory reality and in the growth P&L owners expect. A ProSight risk expert shares where this responsibility is landing across the industry, and a member leader adds the line-of-business view.

Aspiration: envisioning the Human+AI banking workforce

The collective looks ahead to the workforce it wants to build, and to the questions leaders need to answer to get there.

THEME 07

March, early
Virtual

AI and your brand: trust on the front line

This session centers on the people who work with customers every day: tellers, contact center staff, commercial bankers, and wealth teams. AI offers them real performance gains and real risks to morale and customer experience. If front-line employees do not trust their AI teammates, the relationships that set banks apart erode quietly. We treat this as an internal trust question first and a customer question second.

THEME 08 • MORNING

March, later
On-site

The harder questions: bias, conscientious objection, workarounds, and in the loop vs. on the loop

The year's most open-ended session. How do you respond when an employee objects to AI on ethical grounds, when a team quietly works around a tool, or when someone relies on it too heavily? We also separate being in the loop, actively reviewing AI decisions, from being on the loop, monitoring them. An outside guest joins the conversation.

PROJECT STUDIO 4 OF 5 • AFTERNOON

Review the first draft of the taxonomy and ROI library, and capstone checkpoint 3.

THEME 09

April, early
Virtual

Leading and communicating through the change

After the harder questions comes the practical one: how does a leader talk about this change with their team, their executive team, and their board? We focus on language and framing, and on leading through people rather than running it as a software rollout. The collective reviews what fell short, where there were unexpected wins, and which leadership skills are proving most effective.

THEME 10

April, later
Virtual

The labor economics of Human + AI teams, revisited

We return to a thread from the fall pilot discussions: how should institutions measure the economics of Human + AI teams, and where is that measurement heading? We look at the gaps in how AI's labor impact has been measured so far, and why a standard 20 percent efficiency target is the wrong goal. This sets up the final measurement work.

Execution: leading and measuring team performance

The collective defines how Human + AI performance is measured, prepares to take the work to the board, and presents what it has built.

May, early Virtual	THEME 11 Measuring what matters: KPIs, ROI, and the collective's taxonomy A working session on the collective's flagship deliverable. Together we define the metrics that matter most for Human + AI banking team performance, drawing on the pilot stories and labor economics discussions from earlier in the year. The output completes the foundation of the AI Banking Benchmarking Taxonomy.
May, later Virtual	PROJECT STUDIO 5 OF 5 Taxonomy refinement and capstone checkpoint 4
June, early Virtual	THEME 12 The board conversation: presenting the collective's work upward Members work out how to turn a year of technical and organizational complexity into a story their board will engage with, tailoring ROI messages to different executive leaders. This session prepares the collective for its final presentation, so it is more practice than new content.
June, later On-site <i>closing session</i>	THEME 13 • MORNING Closing the loop: from group taxonomy to your institution's roadmap Each member leaves with guidance on turning the collective's shared taxonomy into a roadmap for their own institution. The taxonomy is a living body of work that future collectives will extend, and it will be shared across ProSight channels. CAPSTONE PRESENTATIONS • AFTERNOON The collective presents the AI Banking Benchmarking Taxonomy.