

ALTIMETRIK SALESFORCE PRACTICE · DREAMFORCE 2026

Claudeforce for Financial Services

Advisors for relationships.
Agents for everything else.



The Banking and Financial Services industry has spent the last decade transforming platforms, modernizing data, and introducing AI into the workplace. The next transformation is different. It is not about putting AI into existing workflows. It is about rethinking who or what does the work. **Claudeforce combines Claude's reasoning capabilities with Salesforce's trusted data, workflows, business logic, and governance to create a path toward AI that can move beyond answering questions to understanding context and helping execute work.**

The Claudeforce advantage for financial services

Financial services run on context. Meaningful customer interactions depend on customer relationships, financial products, transaction history, lending information, regulatory requirements, and organizational policies. An AI model alone does not provide that context. Enterprise data alone does not provide reasoning. Claudeforce brings both together, securely.

Through Amazon Bedrock, Claude runs entirely within the Salesforce Trust Boundary, making Anthropic the first LLM provider whose inference traffic is fully contained within Salesforce's virtual private cloud. **Claude now falls under the same governance commitments that got Salesforce through your information security review.**



WHERE ALTIMETRIK DELIVERS

4 AREAS OF IMPACT

01

ELEVATE THE
RELATIONSHIP

Move relationship managers, advisors, and commercial bankers from information gathering to relationship building. Claudeforce synthesizes every client signal continuously, surfacing proactive next-best actions ranked by revenue potential, without a query being typed.

02

ELEVATE THE
DECISION

Move professionals from processing information to applying expertise. Claudeforce assembles the full picture, applies decisioning rules, identifies exceptions, and prepares recommendations so human judgment goes to the decision itself, not to the context surrounding it.

03

ELEVATE THE
OPERATION

Move operations teams from managing tasks to managing outcomes. Claudeforce coordinates work across workflows, systems, and teams, executing within defined boundaries and escalating only the exceptions that require human judgment.

04

ELEVATE THE
EXPERIENCE

Move service from responding to requests to resolving intent. Claudeforce understands the full context of a customer interaction, retrieves what is needed across connected systems, and orchestrates the next step without routing customers through separate channels.

Relationship Manager

A Wealth Service Agent draws on the full Financial Service Cloud (FSC) household record, products, holdings, recent service cases, open referrals, and flagged risks, and surfaces it as a pre-meeting brief in the time it currently takes to open four systems.

Lending Professional

A Digital Loan Officer Agent gathers documents, cross-checks policy rules, flags missing fields, and prepares a credit summary inside the institution's trust boundary before the lending professional opens the file.

KYC and Onboarding

A KYC intake agent collects, validates, and logs customer data against policy, flags exceptions for human review, and closes routine requests without a handoff queue.

Service Professional

A Banking Service Agent handles balance queries, dispute intake, and card services within the same trust boundary as the FSC record, with a full audit trail, resolving intent rather than routing requests.

REAL AGENTIC WORKFLOWS. REAL IMPACT.

Why Altimetrik?

Agent intelligence is only as effective as the enterprise environment it operates in. That is where our depth matters.

FSC domain depth

Our delivery spans FSC implementation and recovery, loan origination, KYC and AML compliance workflows, and core banking integration built from working on complex financial services use cases.

Claudeforce-ready architecture

Our Headless 360 delivery practice and Governed Copilot work map directly to the integration patterns that Claudeforce relies on as it expands into financial services use cases.

Foundation builders

Claudeforce does not eliminate the need for disciplined data, integration, and governance design. It increases its value. The better the underlying environment, the more effectively agents can reason and act.

3 PRINCIPLES FOR THE AGENTIC WORKFORCE

01

Start with the Work

Identify where highly skilled employees spend time on research, synthesis, coordination, and administration. Those are the opportunities to redesign.

02

Engineer the Context

Connect the agent to trusted data, workflows, business rules, and systems it needs to understand the job, not simply the information it needs to answer a question.

03

Design for Trusted Autonomy

Not every task should be autonomous. Agents assist, recommend, and execute within clearly defined boundaries, with human judgment retained where it matters.

The next wave of Financial Services transformation will not be measured by how many AI tools an organization deploys. **It will be measured by how much better its people can work.**

Relationship managers spending more time with clients. **Wealth advisors** spending more time advising. **Lending professionals** spending less time processing. **Service teams** resolving rather than routing.