



How financial services organizations are embracing AI

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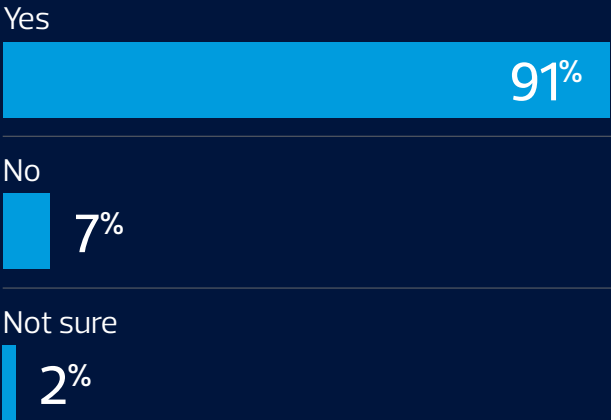
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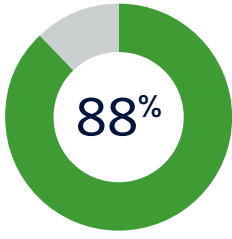
RSM Middle Market AI Survey 2025: U.S. and Canada

Financial services industry responses

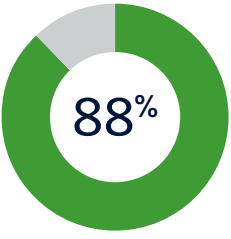
Asked whether their organization currently uses any generative AI tools (e.g., ChatGPT, Azure AI, Microsoft Copilot, custom solution, etc.), either formally or informally, in its business practices, of 142 respondents, the answers were:



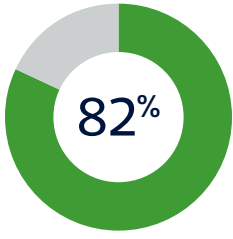
Among the 129 respondents from financial services organizations that currently use generative AI tools in their business practices, the following percentages agreed or somewhat agreed that:



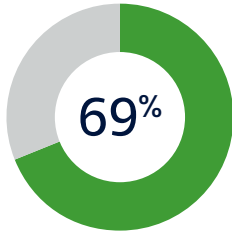
Generative AI has impacted their organization more positively than expected



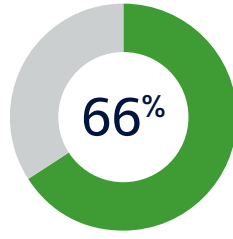
They were prepared for compliance with emerging AI regulations



They have the right staff in place to implement generative AI effectively

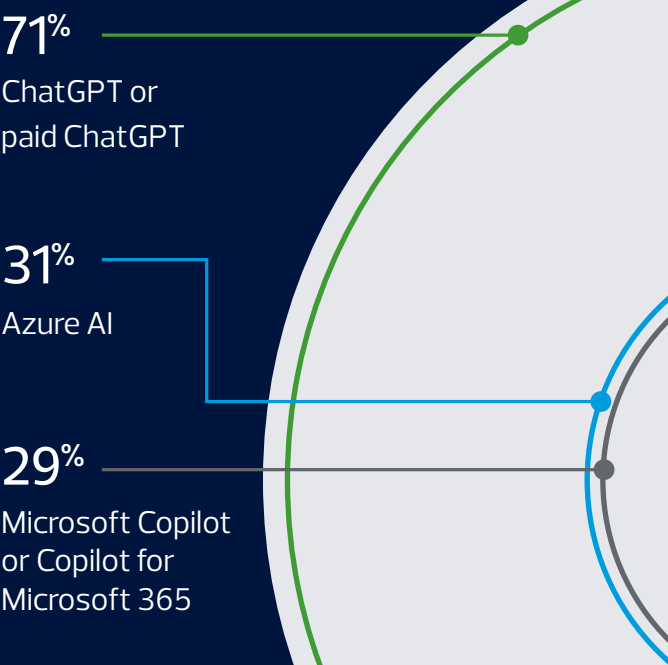


They need outside help to get the most out of their generative AI solutions

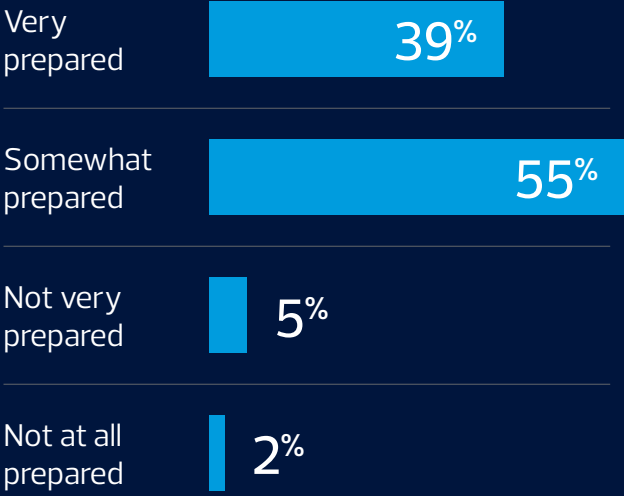


Generative AI has been harder to implement than expected

The top three generative AI tools used were:



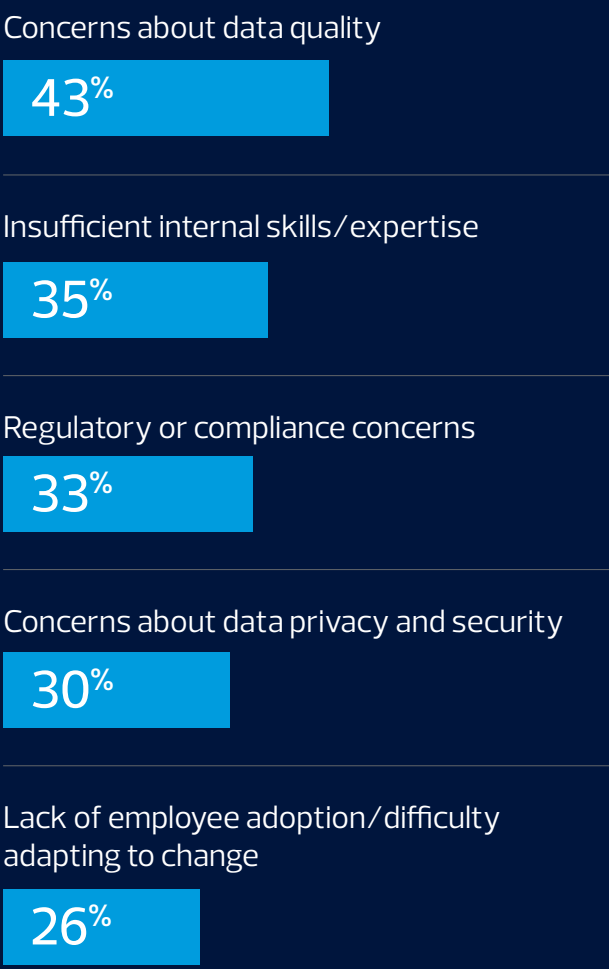
When asked how prepared their organization was to adopt and implement AI in its business practices, respondents said:



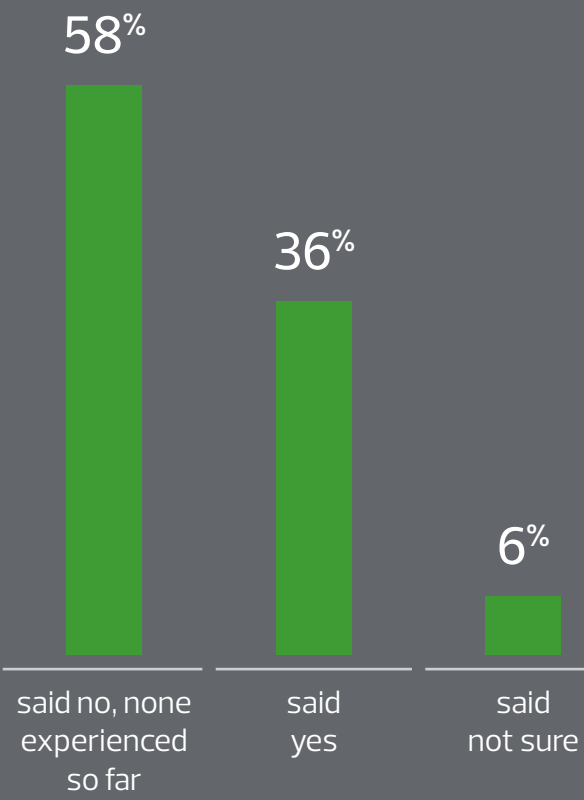
The top five ways respondents said they are currently using AI in their organization were:



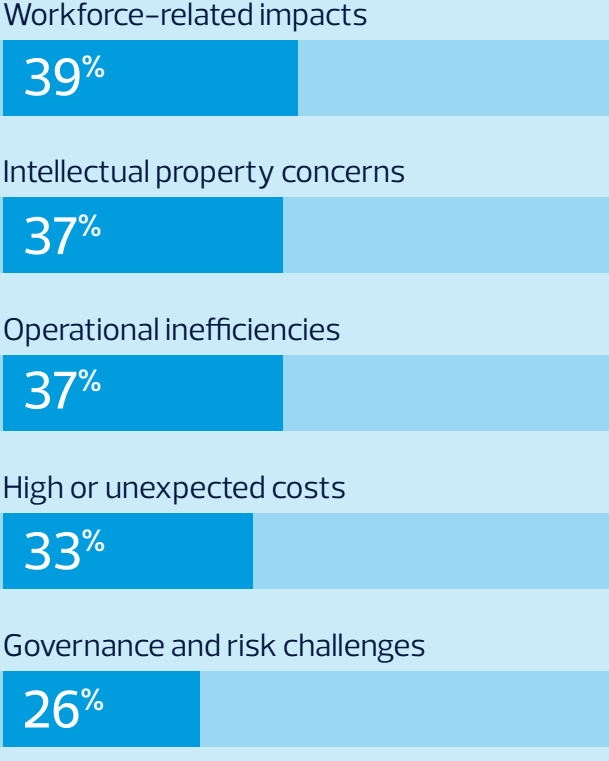
The top five biggest challenges organizations have faced when implementing AI tools or processes were:



When asked if they experienced any negative or unexpected consequences implementing AI initiatives within their organization:



Respondents from organizations that experienced negative or unexpected consequences when implementing AI initiatives identified the following as the top five:



79%

of financial services organizations currently using generative AI tools in their business practices have a budget dedicated to generative AI investments.

Among organizations that currently use generative AI tools and have a budget dedicated to generative AI investments, here are respondents' expectations for that budget for the next fiscal year:

