

# AI transformation - How it is done

**PEDRO SILVA**

Head of Strategic Pursuits



# Key Messages

- 1 **The Solutions team**, by shaping proactive pursuits aligned to client priorities, **has accelerated large deal growth**
- 2 Built over the past nine years, **our Solutions team engages early in pursuits**
- 3 Strongly anchored on **Industry Knowledge** and **Technology Expertise**, we **co-author AI-led transformations**
- 4 By co-authoring the client's ambition, we've created **two reinforcing flywheels** – and **One Value Creation Engine**



# Our Impact

How We Deliver It

The Engagement Model Evolved

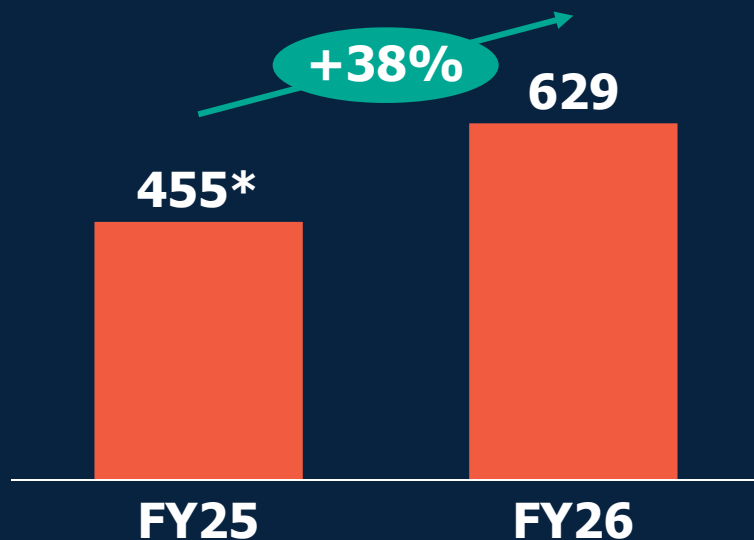
AI-Led Transformation – A Case Study

Why It Matters To You

# Solutions continue to drive **disproportionate value at Coforge**

## Large Deals fuel topline growth...

Large Deals (TCV >\$20M), in \$M TCV



Count

15\*

21

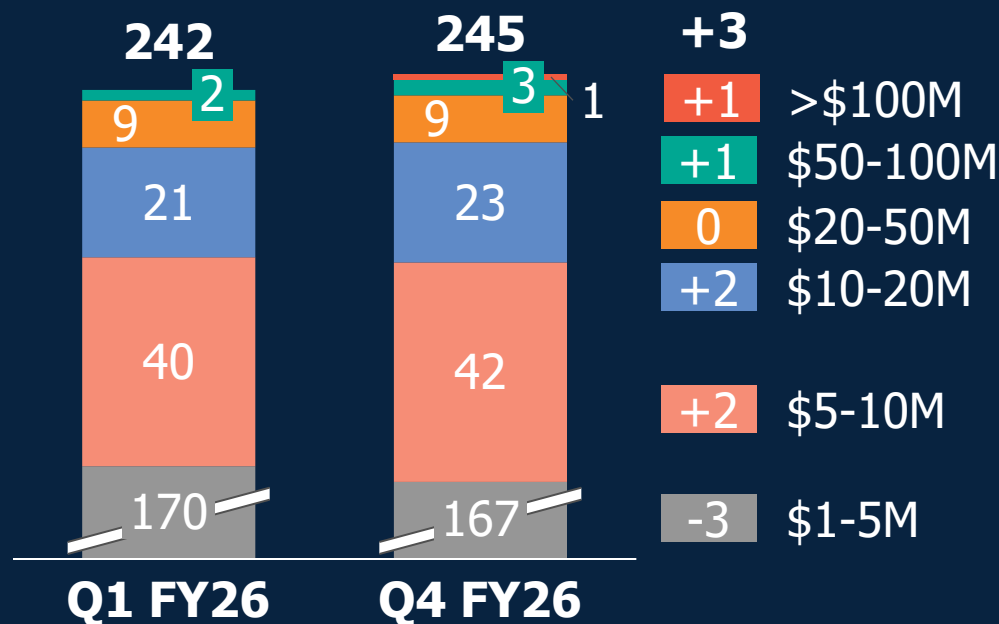
Win Ratio (\$)

38%

47%

## ...and deeper client relationships

Count of clients per ACV range



We do so through **proactive pursuits** that **solution for business priorities**



Our Impact

**How We Deliver It**

The Engagement Model Evolved

AI-Led Transformation – A Case Study

Why It Matters To You

# We are one Solutions team delivering outcomes that accelerate growth



## INDUSTRY PRACTICES

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TTH	INS	BFS
HCLS	PS	

### Points of View

Develops & shares the consolidated domain POV on emerging trends, innovations and disruptions across key industry verticals.

### In Person Support

Attends workshops with customers, and represents Coforge at industry events, forums and webinars.

### Large proactive pitches

Supports outside-in approach, identify whitespace opportunities and position differentiated offerings.



## PURSUIITS & CONTENT

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### Strategic Pursuits

Develop compelling proposals that align with industry trends and client requirements.

### Competitive Proposals

End-to-end management of client RFXs tenders, and frameworks, that are compliant and competitive, showcasing our value.

### Content

Maintaining iShare, a compendium of reusable assets, success stories, case studies, and content across the ecosystems.



## BUSINESS CONSULTING

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### Business Transformation

Structured shaping of enterprise transformation opportunities with measurable business value.

### Program Management

Structured problem framing, and design with clear business value. Disciplined oversight & governance of program level initiatives, to realize the value.

### Process Engineering

Six-Sigma & Lean frameworks for process identification and mapping of existing states, and future optimized operating models.

# We help account teams become **trusted strategic partners to our clients**

## The **Strategic Partnership** Ladder

### Strategic Partnership

#### Evidence

- Multi-year strategic engagements
- Business value proposition
- Proactive proposals

#### How

- Co-innovate and commit to a **multi-year value** agenda
- Measurable **business outcomes**

### Intentional

- Intentional business reviews: annual reviews & QBRs
- Well-thought account plans

- **Shape demand together**, bringing insight, whitespace mapping, and co-planning

- Deep **industry and business expertise**
- Proactive **thought partnership**

### Foundational

- Predictable renewals
- Trusted cadence
- Transactional engagements

- Right to engage by being **operationally excellent** and **commercially reliable**

- Listen and translate **client needs into actionable plans**
- **Execute flawlessly** on a well-structured account plans

# I'd like to share two examples of **propositions to create value for clients**

## Private Equity Channel

Strategic Partnership



## Airline

Quarterly Business Review



# Global Private Equity Firm: Strategic Partnership

## Coforge

### AI in the Base Case

April 2026

### If AI is still "Upside," you're already behind

PE Firm leadership is clear: AI must be in the base investment case; the imperative now is execution discipline!

AI Operating Maturity	Low	High			
<b>Stage of AI Adoption</b>	AI is Now a Base-Case Lever	AI Ambition Is Accelerating Faster Than Execution	This Shifts the Leadership Imperative	Enterprises Are Being Rewired Around AI	AI Becomes the Operating Backbone
<b>What This Looks Like</b>	AI has moved from experimentation to execution, with impact measured in business outcomes, not technical novelty	Actual AI adoption and integration is lagging organizations' ambitions	AI should be treated as a core business capability, not a standalone technology investment	Automation absorbs routine tasks, while human effort shifts toward judgment, creativity, and context	Winning organizations embed AI into daily operations with the same rigor as any core capability

As AI becomes part of the base case, returns will be driven by execution rigor and the ability to scale AI across operations

### Peer PE firms have already industrialized AI and keep investing in it

How top investors embed AI inside the firm – and scale it across portfolio companies

	AI Within the Firm	AI Across Portfolio Companies	Outside-In AI Maturity Assessment
<b>PE Firm #1</b>	<ul style="list-style-type: none"> <li>AI-native operating model</li> <li>Automation across firm operations</li> <li>Centralized AI governance</li> </ul>	<ul style="list-style-type: none"> <li>Agentic AI Factory</li> <li>AI embedded in products &amp; workflows</li> <li>Repeatable, industrialized model</li> <li>30-50% code gen gains</li> </ul>	Leads with the most centralized, repeatable, and product-embedded AI model across firm and portfolio
<b>PE Firm #2</b>	<ul style="list-style-type: none"> <li>Dedicated Data, Digital &amp; AI group</li> <li>AI in underwriting and risk</li> <li>Portfolio performance analytics</li> </ul>	<ul style="list-style-type: none"> <li>Structured Data, Digital &amp; AI group</li> <li>Dedicated portfolio AI teams</li> <li>Incubation + venture studio</li> </ul>	Strong portfolio-wide execution with disciplined ROI
<b>PE Firm #3</b>	<ul style="list-style-type: none"> <li>Data scientists embedded in deal teams</li> <li>AI-driven risk &amp; pricing</li> <li>Advanced investment analytics and IC workflows</li> </ul>	<ul style="list-style-type: none"> <li>Selective AI adoption at asset level</li> <li>Heavy focus on AI Infrastructure (\$1B+) bets</li> </ul>	Excels in AI-enabled investing and infrastructure, with limited portfolio-level standardization
<b>PE Firm #4</b>	<ul style="list-style-type: none"> <li>AI-sustained diligence &amp; monitoring</li> <li>Select GenAI in workflows</li> </ul>	<ul style="list-style-type: none"> <li>Operating partner-led AI adoption</li> <li>Use-case driven, less centralized</li> <li>\$500M+ capex; 200+ AI models</li> </ul>	AI adoption is present but fragmented, lacking a firm-wide portfolio AI platform

AI ambition is now constrained by Execution Capability and Operating Discipline

### Coforge – The Execution Engine

Coforge closes the execution gap – translating AI strategy into repeatable, scalable operations

### Industry Expertise Meets PE Firm Portfolio

Where Coforge's domain depth aligns directly with PE firm's portfolio companies' industries to accelerate execution

	Banking & Financial Services	Consumer & Retail	Healthcare
<b>PE Firm Investments</b>	<b>List of Portfolio Companies in BFS</b>	<b>List of Portfolio Companies in Consumer &amp; Retail</b>	<b>List of Portfolio Companies in Healthcare</b>
<b>Coforge Credentials</b>	<ul style="list-style-type: none"> <li>~30 Years of experience</li> <li>16 of top 100 Global Banks</li> <li>40K+ Advisors on platforms w/ support</li> </ul>	<ul style="list-style-type: none"> <li>8 of top 30 US Brands</li> <li>2 of the top 5 Central Banks</li> <li>10K+ Banking domain experts</li> </ul>	<ul style="list-style-type: none"> <li>75+ Worldwide Clients</li> <li>100+ Domain Engagements</li> <li>1200+ Certified Experts</li> </ul>

### Our Customer Success Stories Across Multiple AI Use Cases

Repeatable AI solutions delivering consistent value across organizations

Our Solution	Our Impact
<ul style="list-style-type: none"> <li>Enterprise AI foundation to scale GenAI adoption and accelerate development</li> <li>Built a governed AI factory with reusable components to standardize development, automate QA, and scale AI use cases, accelerating delivery and productivity</li> </ul>	<ul style="list-style-type: none"> <li>~25% faster development cycle</li> <li>100% automated test generation</li> <li>20% reduction in QE effort</li> </ul>
<ul style="list-style-type: none"> <li>AI-governed legacy modernization to accelerate engineering</li> <li>Built a governed AI factory with reusable components to standardize development, automate QA, and scale AI use cases, accelerating delivery and productivity</li> </ul>	<ul style="list-style-type: none"> <li>70-80% accuracy in automated specification generation</li> <li>50-60% reduction in manual effort</li> <li>Faster developer ramp-up for TPR and TPR teams</li> </ul>
<ul style="list-style-type: none"> <li>AI assistant for software requirement document generation</li> <li>Deployed AI assistant to generate structured requirement documents and automate quality checks, improving completeness, compliance</li> </ul>	<ul style="list-style-type: none"> <li>30-40% time savings</li> <li>25-35% improvement in quality/completeness</li> <li>20-30% reduction in expert review workload</li> </ul>

### Operationalizing AI Across the PE Firm Ecosystem

How portfolio-level execution and firm-level constructs work together to scale value creation

### Track 0 – Pre-Deal AI Due Diligence Sprint

Understand the real AI upside and what it will take to deliver it

Purpose	What we do	Outputs
De-risk the AI thesis and quantify value before close, and convert it into a first-100-days execution plan	<ul style="list-style-type: none"> <li><b>A</b> AI/Tech baseline: data readiness, architecture, security/compliance, delivery maturity</li> <li><b>B</b> Use-case/value thesis: shortlist highest-ROI AI plays with strong + feasibility</li> <li><b>C</b> Delivery + operating plan: talent, governance, vendor landscape, dependencies</li> <li><b>D</b> Integration into 100-days: sequencing, milestones, KPIs, investment needs</li> </ul>	<ul style="list-style-type: none"> <li><b>A</b> AI Due Diligence memo risks, opportunities, recommended posture</li> <li><b>B</b> First-100-Days AI plan sequenced roadmap + quick wins</li> <li><b>C</b> Value sizing ranges + assumptions; ties to VCP</li> <li><b>D</b> Execution model recommendation which of Tracks 1-3 to use post-close</li> </ul>

### How We Engage at the Portfolio Company Level

Three execution models designed to meet each company where it is – strategy, solutions, or scaled transformation

Our Focus	Our Deliverables	Expected Output
<b>Track 1</b> Overall AI Strategy	<ul style="list-style-type: none"> <li>Define a clear, business-aligned AI strategy and readiness baseline for each portfolio company</li> <li>Target high-priority PE firm portfolio companies</li> <li>Assess AI maturity across data, tech, and talent</li> <li>Prioritize use cases by value and feasibility</li> <li>Sequenced roadmap with expected EBITDA impact</li> </ul>	<ul style="list-style-type: none"> <li>Sequenced AI roadmap with prioritized use cases and expected EBITDA uplift</li> </ul>
<b>Track 2</b> Targeted AI Point Solutions	<ul style="list-style-type: none"> <li>Road study / POCs fine-tuned on enterprise data</li> <li>Validate model performance and financial feasibility</li> <li>Integrate AI into workflows at scale</li> <li>Stand up governance – controls, dashboards, monitoring</li> </ul>	<ul style="list-style-type: none"> <li>Enterprise-wide AI deployment; faster and more cost-effective than custom build</li> </ul>
<b>Track 3</b> Enterprise Technology Services	<ul style="list-style-type: none"> <li>Enterprise Platforms &amp; Core Systems Modernization</li> <li>Engineering, DevSecOps &amp; Quality at Scale</li> <li>Managed Services, Infrastructure &amp; Cybersecurity</li> <li>Portfolio-Level Integration &amp; Governance Enablement</li> </ul>	<ul style="list-style-type: none"> <li>AI-ready platforms that reduce execution friction and accelerate EBITDA impact at scale</li> </ul>

### Commercial & Delivery Models for Portfolio Companies

Flexible engagement structures aligned to strategy, speed, and scale of execution

Commercial Models	Delivery Models
<ol style="list-style-type: none"> <li><b>Outcome-linked pricing</b> Tied to revenue uplift and cost reduction</li> <li><b>Subscription-based billing</b> for hybrid pods and pre-built vertical/horizontal solution libraries</li> <li><b>Annual retainers</b> with success-based execution sprints</li> </ol>	<ul style="list-style-type: none"> <li><b>FDEs + Ecosystem partners</b> Develop a scaled AI strategy and roadmap for enterprise adoption</li> <li><b>Hybrid Pods (agents + humans)</b> Customize and deploy pre-built solutions at speed, via Coforge AI platform</li> <li><b>End-to-end ownership</b> across enterprise transformation</li> </ul>

### PE Firm: How to Institutionalize the Capabilities

Institutional AI constructs that give PE firm repeatable execution capability and portfolio-wide visibility

Our Focus	Our Deliverables
<b>Capability 1</b> The PE Firm AI Center of Excellence	<ul style="list-style-type: none"> <li>Build a repeatable, governed, firm-wide AI execution capability that persists across portfolio companies and investment cycles</li> <li>A jointly operated construct (PE Firm + Coforge) that serves as the connective tissue between the PE firm and its portfolio on AI</li> <li>Modeled on leading-PE best practices, but tailored to PE firm's operating model and scale</li> </ul>
<b>Capability 2</b> Portfolio AI Command Centre	<ul style="list-style-type: none"> <li>Give PE firm a single, portfolio-level view of AI execution, impact, and maturity across all investments</li> <li>A central operating and reporting layer</li> <li>Aggregates AI activity, outcomes, and readiness across portfolio companies</li> <li>Designed to support value-creation oversight, prioritization, and LP narratives</li> </ul>

### Two paths to activate – both can start now

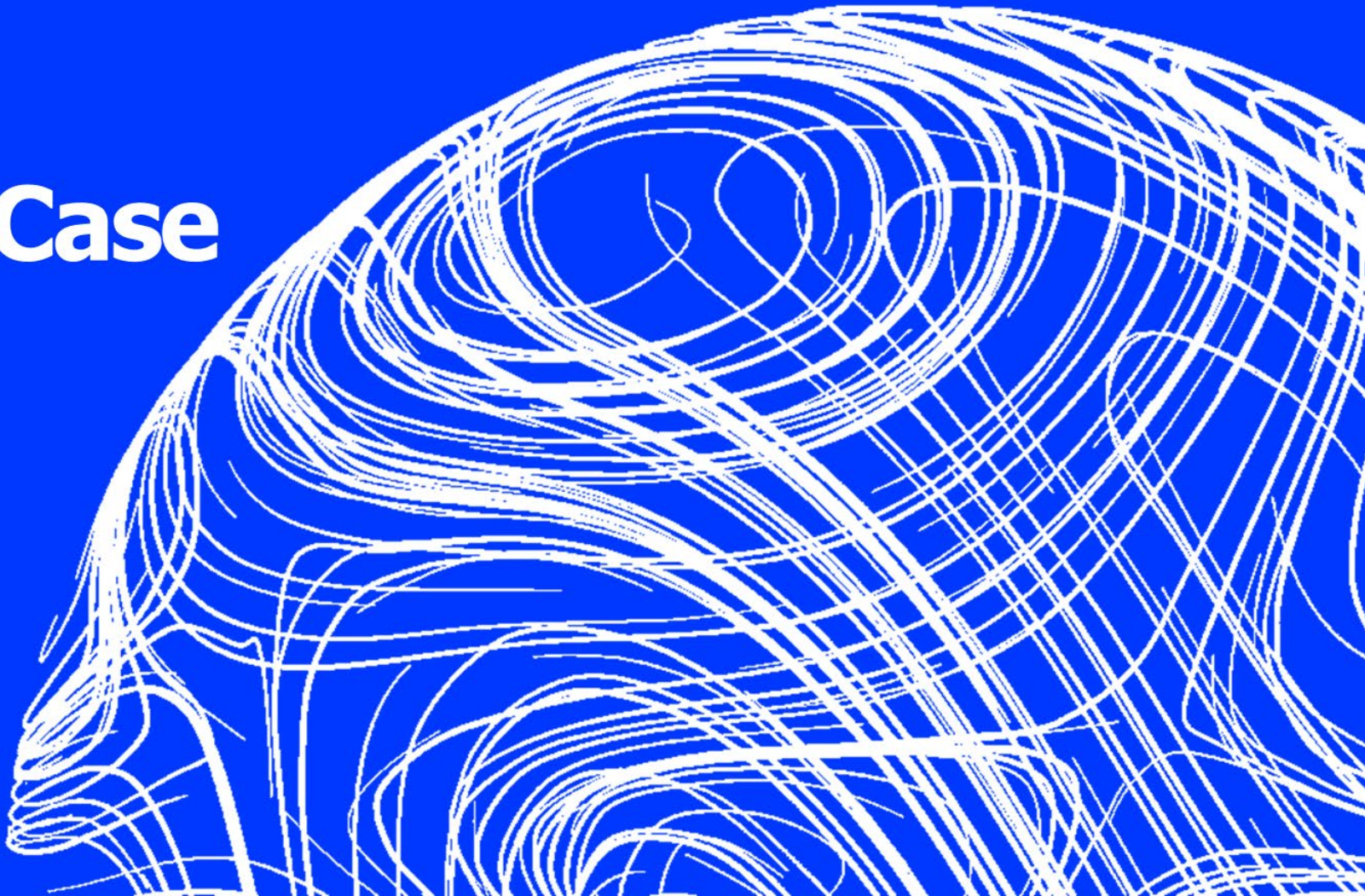
Two engagement paths, complementary, running in parallel. The PE Firm chooses the pace and sequence

Path A	Path B
Portfolio Company Direct	PE Firm
<ul style="list-style-type: none"> <li>Jointly prioritize 3-5 portfolio companies based on key triggers</li> <li>Coforge runs AI Strategy &amp; Maturity Assessments for each company</li> <li>Deliver AI Opportunity Portfolios to PE Firm before portfolio companies' boards</li> <li>Deploy AI Pods against highest-value use cases</li> </ul>	<ul style="list-style-type: none"> <li>Jointly review AI and technology dimensions of the Value Creation Plans across the portfolio</li> <li>Map opportunities to the right track (Tracks 1-3)</li> <li>Design and activate Portfolio AI Command Centre and the PE Firm AI Center of Excellence</li> </ul>

**Coforge**

# **AI in the Base Case**

April 2026






# Industry Expertise Meets PE Firm Portfolio

Where Coforge's domain depth aligns directly with PE firm's portfolio companies' industries to accelerate execution

	Banking & Financial Services	Consumer & Retail	Healthcare	
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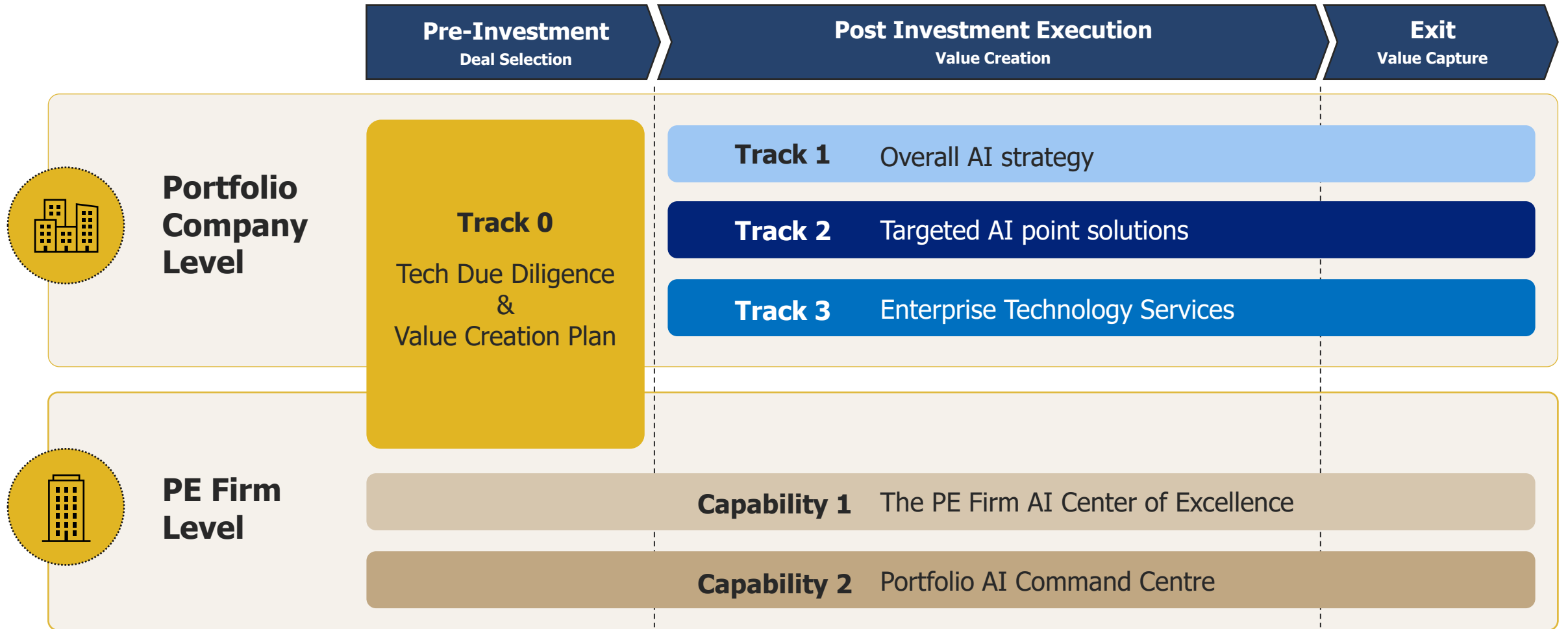
# Our Customer Success Stories Across Multiple AI Use Cases

Repeatable AI solutions delivering consistent value across organizations

	<b>Leading HR and Benefits Services Provider for SMBs</b> Banking & Financial 	<b>Global travel technology company operating across 130+ countries</b> Travel & Consumer 	<b>Global leader in surgical &amp; consumer eye care</b> Healthcare 
<b>Our Solution</b>	<b>Enterprise AI foundation to scale GenAI adoption and accelerate development</b>  Built a governed AI factory with reusable components to standardize development, automate QA, and scale AI use cases, accelerating delivery and productivity	<b>AI-powered legacy modernization to accelerate engineering</b>  Deployed a GenAI solution to decode legacy systems, extract business logic, and generate specs, speeding reverse engineering and reducing manual effort	<b>AI assistant for software requirement document generation</b>  Deployed AI assistant to generate structured requirement documents and automate quality checks, improving completeness, compliance
<b>Our Impact</b>	<b>~25%</b> faster development cycle <b>100%</b> automated test generation <b>20%</b> reduction in QE effort	<b>70-80%</b> accuracy in automated specification generation <b>50-60%</b> reduction in manual effort <b>Faster developer ramp-up</b> for TPM and TPF teams	<b>30-40%</b> time savings <b>25-35%</b> improvement in quality completeness <b>20-30%</b> reduction in expert review workload

# Operationalizing AI Across the PE Firm Ecosystem

How portfolio-level execution and firm-level constructs work together to scale value creation

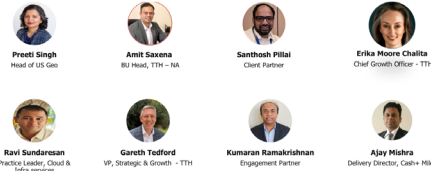


# Airline: Quarterly Business Review

## Quarterly Business Review | May 2026



## Team Coforge



## Agenda

- 01 Coforge Updates
- 02 Updates since last QBR
- 03 Engagement & Marketplace Updates | AI Adoption
- 04 Client Updates
- 05 Industry Trends
- 06 Client & Coforge partnership – Value creation

## Industry Trends

### The path forward for the airline industry requires bold moves across technology, partnerships, and strong operating model

2026 started strong +5-6% Global RPN Growth (2026E) – Sustained Annual Growth

However, structural headwinds are compressing margins and forcing a strategic reset

Three technology inflection points are becoming hyperfocus, creating a window of opportunity for transformation

The industry is converging on four Priorities that will define winners in the next cycle

- Geopolitical tensions
- Fuel Supply Risk & Fuel Price Volatility
- Margin pressures re. Inflationary impacts of Labor agreements
- Funding Inconsistency
- QEM Delivery Delays & Engine Reliability Issues, constraining network's growth
- Global Supply Chain Constraints
- ATC & Airport Capacity Constraints & Modernization Challenges

Modern Airline Retailing: 15+ airlines & airline groups commenced

Leanex Modernization Wave: 70% airlines prioritizing core transformation

Operational Resilience & Real-Time Scheduling: 22% reduction in operational disruptions

Brand Differentiation

Enhanced Loyalty

Increased Revenue Capture

Cost Discipline

### We understand you have been consistently delivering value by being on a transformation journey and delivering margin expansion

	Network & Fleet	Increased Revenue	Customer Priorities	Loyalty	Re-engineering Business	Results Achieved
2025	Creating global Network	Drive Premium Revenue	Enhance Customer Experience	Lead in Loyalty	Operate with excellence	Revenue hit a record \$13.9B, 23.8% YoY increase
2025	Maximizing the power of Network & Fleet	Advantage Sales, Distribution & RM Effects	Delivering a consistent, elevated Customer Experience	Building Partnerships to Support Loyalty & Lifetime Value	Operate with Excellence	Revenue climbed to \$54.4B
2024	Clear, strong & amplified Network	Operational Excellence	Customer Focus	Revenue	Re-engineering the Business	Annual Revenue reached \$34.2B

### From our deep engagement with you and the industry, these initiatives stand out as the ones that will help accelerate your business goals

Initiatives	Network & Fleet	Increased Revenue	Customer Experience	Loyalty	Re-engineering Business
Loyalty Modernization					
PSS Decoupling					
Data Orchestration					
FOSS Modernization					
Digital CX					
Data Platform & AI Innovation Factory					
Cloud Modernization, SRE & FinOps					
Workplace & ERP					

### We've built Aeronova to de-risk and accelerate move to modern airline retailing, backed by reusable assets, proven experience and a business-first approach

**AERONOVA**  
A transition framework de-risking and fast-tracking the move to OOOE

Reusable Playbook: Templates for every migration stage

Test Packs: Exhaustive scenarios for system integrity

Governance Models: Frameworks for complex stakeholders

AI Accelerators: Custom AI solutions to bring efficiency

unlocking: Lower TCO, Faster time-to-revenue, Reduced transition risk

**Differentiator**  
Why we win vs. the competitors

- Pre-built, deployable assets
- Sequenced, business-led roadmap
- Faster, lower-risk path to value

**Industry Approaches**  
We are at front & center

- Full Stack Implementation: End-to-end solution from a single provider
- Hybrid Approach: Strategic components built in-house, integrated with modular products from providers
- Beasible In-house build: Custom-built core retailing components by the airline

**Our Presence**  
As system integration & managed service partner

- Ongoing engagements: Sabre, Finnair, Amadeus, British Airways, Accor, FLYR, Condor
- Business Impact delivered: Significant cost efficiencies, Revenue Acceleration
- Active discussions: Qantas, Ethiopian, Lufthansa, TAP

### AeroNova covers every phase of your retailing transformation, from business readiness to contact center, with dedicated accelerators that make each step faster and de-risked

HOW AERONOVA SUPPORTS AIRLINES END-TO-END

01 Business Readiness & Alignment	02 Digital Engineering	03 Quality Assurance & Testing	04 Domain Academy	05 Offer/Order Ready Contact Center
FOCUS AREAS: Define business areas and use cases in OOOE, Map as-is and to-be processes across OOOE	FOCUS AREAS: Automate build with agents & workflows, Agile engineering and integration acceleration	FOCUS AREAS: Automate testing across PSS and OOOE, AI-led digital assurance and QA	FOCUS AREAS: Update business and technical teams on OOOE, Product- and process-aligned learning paths	FOCUS AREAS: Redesign processes for order-based servicing, Native agent enablement, legacy & OOOE coexistence

Agents@HERE, Forge-X, Percipio, Voyager AI, Qnect AI

### Paradigm Shift | Building a data fabric for integrated disruption management

01 THE PROBLEM: Strong data science / weak execution layer

02 THE AS-IS: Siloed recovery and fragmented data

03 PRESENT LIMITATIONS: Eight structural barriers

04 NEW PATH FORWARD: Coforge's Agentic Data Fabric

05 FUTURE STATE PARADIGM: Business Architecture

06 THE FUTURE OPPORTUNITIES: Real-time digital coordination & visibility

### Paradigm Shift | Building a data fabric for integrated disruption management

04 NEW PATH FORWARD: Coforge's Agentic Data Fabric

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06 THE FUTURE OPPORTUNITIES: Real-time digital coordination & visibility

### Agentic SRE | Autonomous Maintenance of Mission Critical Systems for One of the Largest Airlines in the US

Architecture Diagram

1M+ Log Processed Daily

1,000+ Anomalies Detected

15 Alert Sources

40% Operations, 20% QA, 20% Support

3 months Production Rollout

2 months Scaling Pre-Prod

# Industry Trends

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# The path forward for the airline industry requires bold moves across technology, partnerships, and strong operating model

<b>2026 started strong</b>	<b>+5-6%</b>	Global RPK Growth (2026E) — <i>Resilient Demand, regionally uneven</i>	<b>\$155-160B</b>	Ancillary Revenues — <i>16% total airline revenue</i>	<b>+30% NDC</b>	NDC enabled distribution 2026 — <i>Rapid acceleration</i>	<b>\$60B</b>	Disruption costs pa. — <i>Ops resilience is a board priority</i>
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However, **structural headwinds are compressing margins** and forcing a strategic reset

Three **technology inflection points** are becoming hyperfocus, creating a window of opportunity for transformation

The industry is converging on **four priorities** that will define winners in the next cycle

- **Geopolitical tensions**
- **Fuel Supply** Risk & Fuel Price volatility
- **Margin pressures** re. inflationary impacts of Labor agreements
- Federal **Funding inconsistency**
- OEM Delivery **Delays** & Engine Reliability Issues, constraining network growth
- Global **Supply Chain Constraints**
- ATC & Airport **Capacity Constraints** & **Moderinization Challenges**

## 1 **Modern Airline Retailing**

**15+** airlines & airline groups commenced

Global carriers like Lufthansa Group, IAG, Delta, United, Emirates, Qantas, Finnair etc. commenced their transformation journey

## 2 **Legacy Modernization Wave**

**70%** airlines prioritizing core transformation

Focus on carve-outs, de-coupling and progressive migration, AI-embedded modernization

## 3 **Operational Resilience & Real-Time Orchestration**

**22%** reduction in operational disruptions

Scaling agentic AI re-accommodation, event-driven data fabrics, infrastructure modernization, and automated DCS journey orchestration

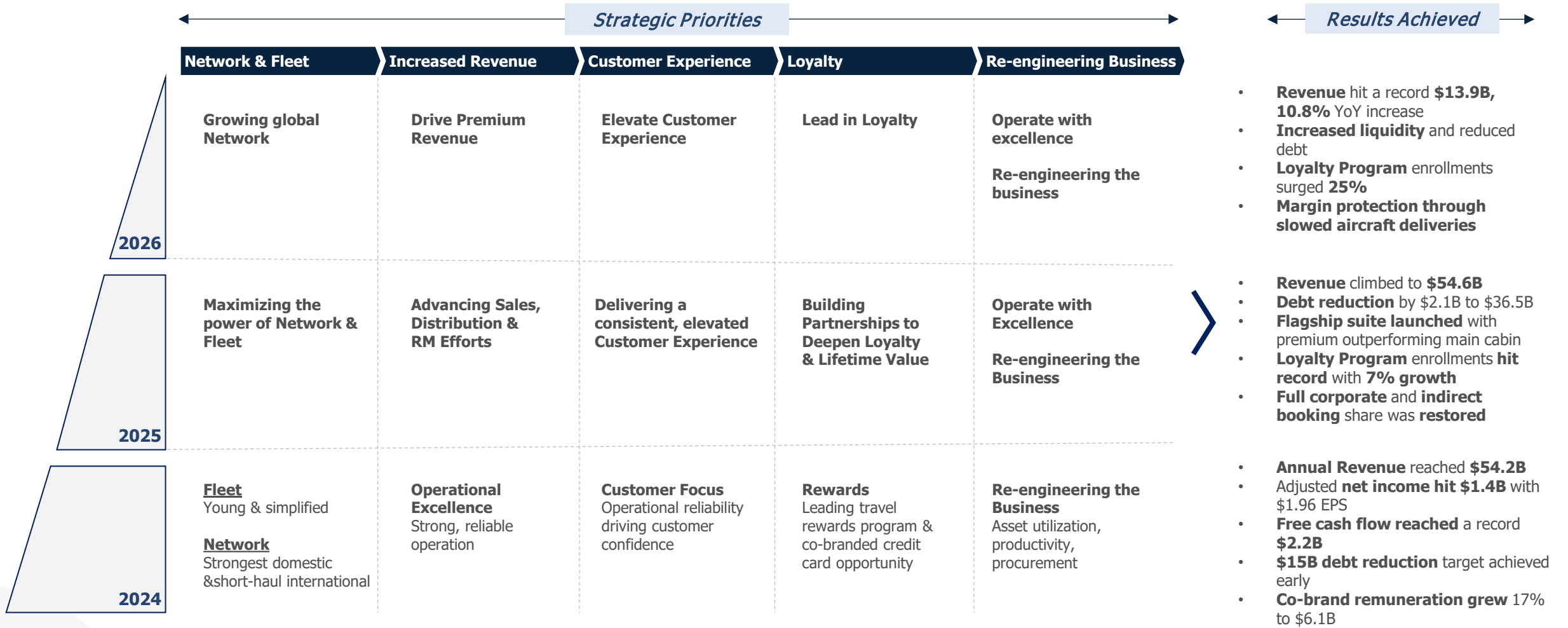
**Brand Differentiation**

**Enhanced Loyalty**

**Increased Revenue Capture**

**Cost Discipline**

# We understand you have been consistently delivering value by being on a transformation journey and delivering margin expansion



# From our deep engagement with you and the industry, these initiatives stand out as the ones that will help accelerate your business goals

Initiatives	Network & Fleet	Increased Revenue	Customer Experience	Loyalty	Re-engineering Business
<b>Loyalty Modernization</b> - Cash + Miles		●	●	●	
<b>PSS Decoupling</b> - MAR		●	●	●	●
<b>Data Orchestration</b> - Disruption Resilience Tech			●	●	●
<b>FOS Modernization</b> - Crew, Flight Ops			●		●
<b>Digital CX</b> - Next Gen Contact Centre & Conversational AI		●	●	●	●
<b>Data Platform &amp; AI Innovation Factory</b>	●	●	●		●
<b>Cloud Modernization, SRE &amp; FinOps</b>					●
<b>Workplace &amp; ERP</b>					●

**Strategic Initiatives** we are extensively working on with other players

- 1 Modern Airline Retailing
- 2 Disruption Management
- 3 Next Gen Contact Centre
- 4 Cloud Modernization, SRE, FinOps

# We've built Aeronova to de-risk and accelerate move to **modern airline retailing**, backed by reusable assets, proven experience and a business-first approach

## AERONOVA

A transition framework de-risking and fast-tracking the move to OOSD



**Reusable Playbook**  
Templates for every migration stage



**Test Packs**  
Exhaustive scenarios for system Integrity



**Governance Models**  
Frameworks for complex stakeholders



**AI Accelerators**  
Custom AI automation to bring efficiency

### *unlocking*

- **Lower TCO**
- **Faster time-to-revenue**
- **Reduced transition risk**



### Differentiator

**Why we win vs. the competitors**

We bring **business-first transformation** and not just engineering headcount, through

- Pre-built, deployable assets
- Sequenced, business-led roadmap
- Faster, lower-risk path to value



### Industry Approaches

**We are at front & center of**

- **Full Stack Implementation:** End-to-end solution from a single provider
- **Hybrid Approach:** Strategic components built in-house, integrated with modular products from providers
- **Bespoke in-house build:** Custom-built core retailing components by the airline



### Our Presence

**As system integration & managed services partner**

- **Ongoing engagements:** Sabre, Finnair, Amadeus, British Airways, Accelya, FLYR, Condor
- **Business impact delivered:** Significant cost efficiencies, Revenue Acceleration
- **Active discussions:** Qantas, Ethiopian, Lufthansa, TAP

# Aeronova covers every phase of your retailing transformation, from business readiness to contact center, with dedicated accelerators that make each step faster and de-risked

## HOW AERONOVA SUPPORTS AIRLINES END-TO-END

### 01 Business Readiness & Alignment

#### FOCUS AREAS

- Define business areas and use cases for OOSD
- Map as-is and to-be processes across OOSD

#### WHAT THE AIRLINE GETS

- Predefined business scenarios & use cases
- Documented as-is process maps, customizable

### 02 Digital Engineering

#### FOCUS AREAS

- AI-powered SDLC with agents & workflows
- Agile engineering and integration acceleration

#### WHAT THE AIRLINE GETS

- Scalable OOSD architecture blueprints
- Faster delivery via Coforge ForgeX

### 03 Quality Assurance & Testing

#### FOCUS AREAS

- Automate testing across PSS and Order platform
- AI-led digital assurance and QE

#### WHAT THE AIRLINE GETS

- 10,000+ airline test cases
- PNR-Order traceability and validation tools

### 04 Domain Academy

#### FOCUS AREAS

- Upskill business and technical teams on OOSD
- Product- and process-aligned learning paths

#### WHAT THE AIRLINE GETS

- Domain Training Academy on OOSD modules
- Role-based modules and AI Knowledge Bot

### 05 Offer/Order Ready Contact Center

#### FOCUS AREAS

- Redesign processes for order-based servicing
- Native agent desktop, legacy + OOSD coexistence

#### WHAT THE AIRLINE GETS

- Agents fluent in OOSD CC UX
- SOPs purpose-built for OOSD operations

#### EMBEDDED UNDERLYING FOUNDATION



# Paradigm Shift | Building a data fabric for integrated disruption management

## 01 THE PROBLEM

### Strong data science / weak execution layer

Modeling and tooling for recovery detection and resolution have advanced over many years.

Sub-optimal core systems and solution architectures, however, prevent the timely and effective commitment of the recovery solutions produced by the analytics, at scale.

### Siloed recovery and fragmented data

Expertise and solutioning across the industry has typically been focused on disruption resolution within a single critical ops domain.

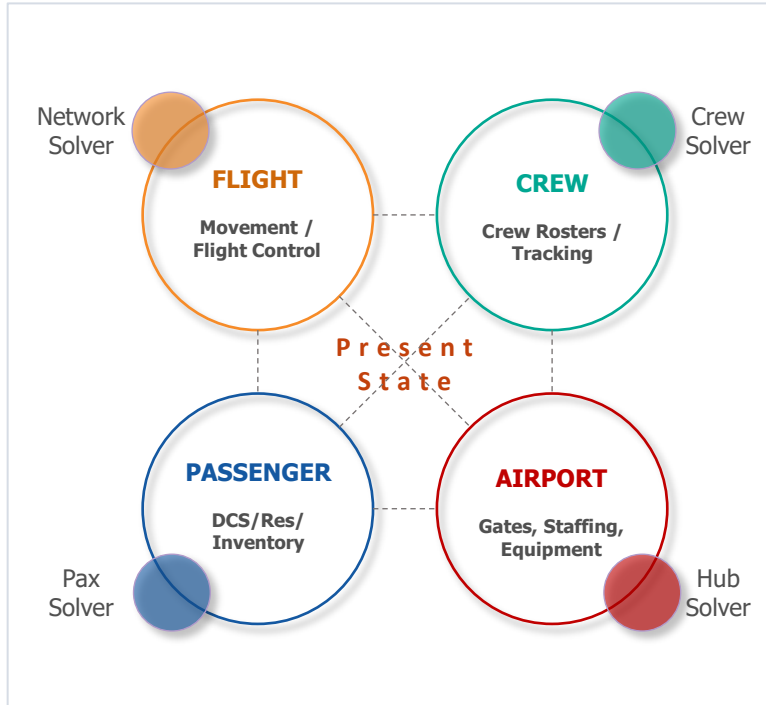
Data needed to formulate recovery scenarios is spread across multiple systems, possibly requiring manual coordination across teams to develop, evaluate and commit solutions

### Big hammer – small nut!

There is a lack of capability to address smaller, localized disruption impacts, to detect, recommend, resolve and maintain operational integrity throughout the day.

Current gen tooling is almost exclusively focused on mass-disruption

## 02 THE AS-IS



Recovery workflows built around / limited by the data and functional siloes of today's technologies.

These are sub-optimal, error prone, time consuming supported by manual coordination and decisioning templates

## 03 PRESENT LIMITATIONS

### Eight structural barriers

- 1 Siloed Solutioning**  
Capabilities engineered for use in a single domain, leading to optimization of one resource group at the expense of others
- 2 Linear Problem Solving**  
Sequential, not concurrent scenario creation. The outputs of one solution set the parameters for the next. Slow, often manual
- 3 Fragmented Data**  
Data needed for holistic problem solving is scattered across multiple tools, impacting informed decision making
- 4 File-Based Exchange**  
Poor interoperability between (a) solvers and core systems and (b) between solver tools
- 5 No Shared Sandbox**  
No safe space for sharing, evaluating and comparing scenarios, especially across multi-vendor solutions
- 6 Execution Latency**  
Commitment of solutions is slow, often queue-based. deployment to systems of record
- 7 Lack of Simulation**  
Real-time holistic simulation out of scope today. Present gen tech cannot support it.
- 8 Fear of Automation**  
Given the risks to customer service delivery and brand reputation, there has been reticence to adopt autonomous solutioning

# Paradigm Shift | Building a data fabric for integrated disruption management

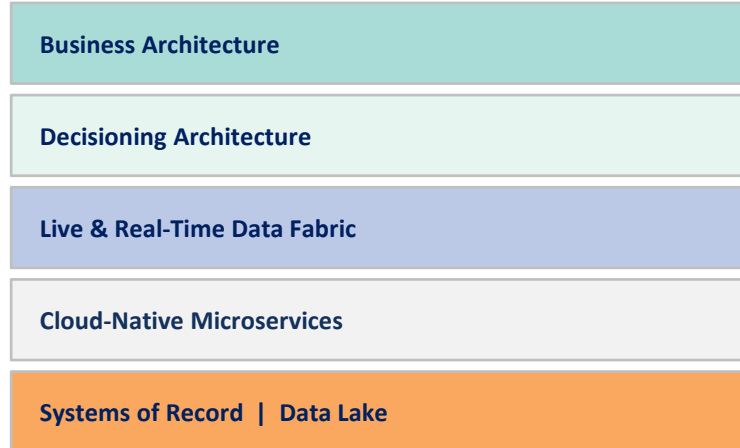
## 04 A NEW PATH FORWARD

### Coforge's Agentic Data Fabric

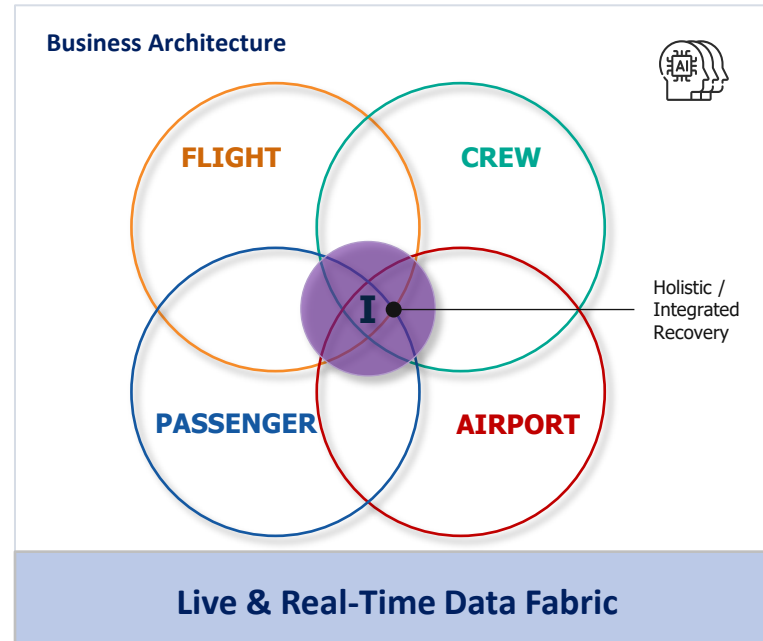
A modern AI-led architecture and live data fabric, integrated with core systems via cloud-native microservices.

Abstracts solutioning away from core systems, enabling idea incubation, innovation and continuous improvement

#### TARGET ARCHITECTURE



## 05 FUTURE STATE PARADIGM



Creates an environment where business solutions can be deployed & interfaces, and ML / AI based modelling can be trained, new practices, approaches & playbooks for disruption detection & resolution can be developed to drive continuous learning & improve operational efficiency

## 06 THE FUTURE OPPORTUNITIES

- ▶ Real-time digital coordination & visibility
- ▶ Holistic Problem Solving
- ▶ Early detection & outcome prediction
- ▶ Simulation, modelling & recommendation
- ▶ Address both minor and major events
- ▶ Abstracts innovation away from core systems
- ▶ Reduces time to recovery & stable operations
- ▶ Delivers tangible operational, cost & customer benefits
- ▶ PROTECTS THE BRAND



Our Impact

How We Deliver It

**The Engagement Model Evolved**

AI-Led Transformation – A Case Study

Why It Matters To You

# Industrializing **frontline solutioning** into **firmwide scalable assets and capabilities**

Key Account-Aligned

Central Functions

## Strategic Solutions: Consulting & Central Solutions

### Forward Deployed Engineer

*The "show, don't tell" capability*

### Business Transformation Consultant

*Co-author of the C-suite transformation*

### Central Solutions

*Convert embedded account insight into proactive scaling*

### Industry Practices

*Develops account insights into industry-specific assets*

Zero to One

Business Value First

Scalable Playbook

Scalable Assets



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Why It Matters To You

# The Context: Why This Wasn't "Just Another Deal"

01

## Strong Foundation

- A **long-standing strategic client** with deep platform investments in wealth and asset management

02

## Pressure to Evolve

- **Growth ambition:** double-digit IMS and AUM expansion, with margin improvement through 2030
- **Widening competitive gaps** in sales effectiveness, operations, and advisor experience

03

## Clear Client Signal

*"Think bigger on AI"*

An explicit directive from the client's COO/CFO to raise ambition – not iterate on the status quo

**This isn't a technology refresh** — it is a **business reinvention opportunity anchored in AI**

# Our Journey in Four Steps

**01.**

## **The Starting Point**

From Ideas to  
Structured Opportunity

**02.**

## **The Inflection**

Moving Beyond Proposal to  
Transformation Design

**03.**

## **Co-Creation**

Co-Creating the Transformation

**04.**

## **The Outcome**

A True AI-Led Transformation

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# The Starting Point: From Ideas to Structured Opportunity

## Initial phase

- 1 Long list of AI use cases**  
Surfaced across the client's business lines
- 2 Structured prioritization framework**  
Applied to rank and qualify each opportunity
- 3 ~8 high-value use cases**  
Shortlisted for the pitch

## Focus areas emerged across

Sales intelligence

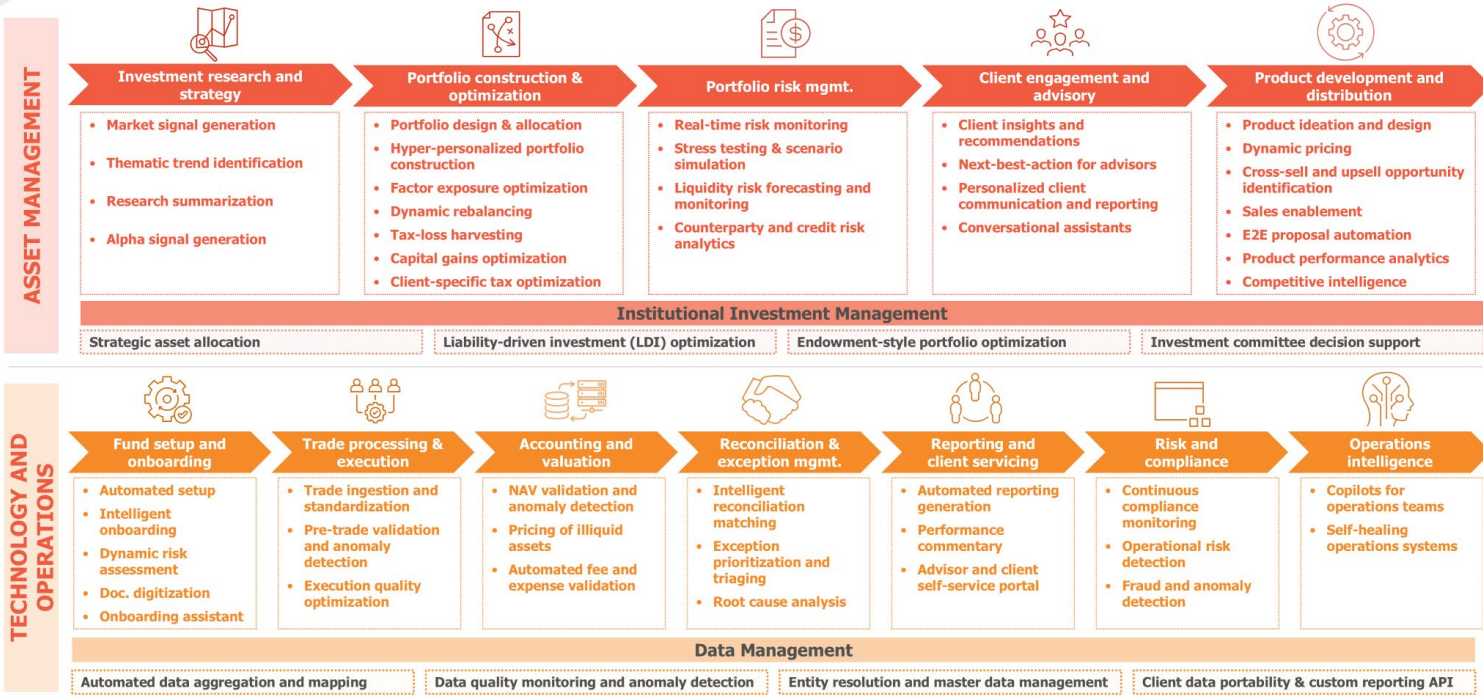
Trade process automation

Transfer agency insights

Advisor experience

**Turning point:** the shift from "AI possibilities" → targeted business-impact use cases

# We have identified a broad set of 50+ business-focused AI use cases that can help the client achieve its ambition



# 01.

## The Starting Point

From Ideas to Structured Opportunity

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# The Inflection: Focusing on Transformation Design

## From Workshop to Strategic Narrative

*This is where the approach becomes powerful — and differentiates Coforge*

### THE SPARK

#### Early AI workshop + “North Star” framing

Shaped the direction of the engagement from the outset



### Anchored the conversation on:

Enterprise-wide transformation

Cross-business value pools

Measurable outcomes

We didn't pitch AI — we co-created the ambition

# 02.

## The Inflection

Moving Beyond Proposal to Transformation Design

**North Star: Transform the client into the AI-Native Operating System for Global Asset & Wealth Management**

A Technology North Star That Enables The Client's 2030 Business Targets

**01. Foundation & Quick Wins**  
Stabilize, unlock, and prove value  
Flip tech budget ratio towards "change-the-business" work

**02. Platform Intelligence**  
Embed AI into the core product and advisor experience  
Competitive differentiation begins – AI investment is now visible to clients and advisors

**03. Agentic Intelligence**  
From automation to agency  
Deploy autonomous AI agents across the entire value chain

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**From Data Moat to AI-Native Platform**

Five Imperatives to Rewire the Client

**01. Flip the tech budget ratio**  
Target moving from ~70% run-the-business toward 60%+ change-the-business

**02. Monetize SEI's proprietary data as an AI asset**  
The decades of investment and client behavioral data sitting in the client's platforms is the core moat. Building AI models trained on this proprietary corpus is irreplicable by fintech entrants

**03. Turn internal AI proof points into advisor and client-facing value**  
Internally validated AI tools must now graduate to the front line, delivering personalized insights, workflow intelligence, and decision support directly where advisors and clients need it most

**04. Build an agentic AI layer into the platform OS**  
Position the client's platform not just as a record-keeping system but as an intelligent operating system for wealth managers – with agents that can autonomously handle compliance checks, rebalancing triggers, and client communication drafting

**05. Govern for trust and fiduciary accountability**  
If the agentic AI scenario comes to pass, the central challenge for firms will shift from how to use AI to how to govern it – with greater accountability, explainability, and trustworthiness needed as clients increasingly delegate financial decisions to digital counterparts

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**How Transformation Could Look Like...**

A Potential Transformation Approach

	Phase 1 Foundation & Quick Wins	Phase 2 Platform Intelligence	Phase 3 Agentic Intelligence
<b>Scope</b>	Unified Data Platform, Cloud Migration Acceleration, AI-Assisted Software Development	Post-Trade Automation, AI-Powered Fund Administration	Wealth Management Agent OS, Autonomous Fund Operations Agent
<b>Tech &amp; Data Foundation</b>	Unified Data Platform, Cloud Migration Acceleration, AI-Assisted Software Development	Post-Trade Automation, AI-Powered Fund Administration	Wealth Management Agent OS, Autonomous Fund Operations Agent
<b>Advisor Intelligence &amp; Distribution</b>	Extend internal AI capabilities to advisor-facing workflows	AI Advisor Co-Pilot, Client Onboarding AI, Proactive Outreach Engine	Internal AI tools for Advisors (Commercialized)
<b>Client &amp; Investor Experience</b>		Hyper-Personalized Client Portal	AI-Powered Private Markets Access
<b>Investment Management &amp; Portfolio</b>		Intelligent Model Portfolio Engine	Real-Time Risk Surveillance Agent
<b>Risk, Compliance &amp; Governance</b>	Compliance Monitoring Automation		Explainable AI & Audit Framework, Fiduciary AI Certification Program

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**... Leading to Tangible Business Results**

What Business KPIs Could Look Like

Metric	Foundation & Quick Wins Phase 1	Platform Intelligence Phase 2	Agentic Intelligence Phase 3
<b>Tech Budget for Change-the-Business</b>	40%	55%	65%+
<b>Advisor Time Saved per Week</b>	2-3 hours	10-15 hours	20+ hours
<b>Onboarding Time</b>	Baseline	-80%	Near-instant
<b>Post-Trade Error Rate</b>	Baseline	-60%	~0%

SEI's Powering Growth Strategy – 2030 Targets

	Growth	Engagement Excellence	Talent Scalability	Operational Growth	Shareholder Return
Tech Budget for Change-the-Business	✓	✓			✓
Advisor Time Saved per Week	✓		✓	✓	✓
Onboarding Time	✓	✓		✓	✓
Post-Trade Error Rate		✓	✓	✓	✓

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# Shifting to Action: Co-Creating the Transformation

## A From a Proposal to a Workplan Approach

### From Proposal to Execution Mindset

- Built a full transformation workplan: business case → **pilot** → **production scaling**
- Structured into **8+ workstreams** driving execution

### Critical shift

From *what to do* to *how to make it real*

## B Deep Client Co-Creation

- **Tight engagement with stakeholders:** Business (Sales, Wealth, IMS), SMEs & transformation leaders
- **Iterative shaping:** refining use cases on real business data & SME input
- Aligning to platform realities (customization, operational complexity)

### Our learning

AI transformation happens in the **messy detail** – not in slides

## A Structured Four-phased Workplan Across Use Cases



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Investor Day

## A Well-defined Timeline for Close Client Co-Creation

ILLUSTRATIVE FOR ONE OPPORTUNITY

Scope element	Milestone	Duration	Checkpoints
<b>Stakeholder intel</b>	Map current workflow, key personas & engage the client to identify key pain points	Week 1	
<b>Business value</b>	Define core problems, user needs, quantify impacts and success metrics	Week 1	▲ FHO Checkpoint
<b>Scope definition</b>	Set scope boundaries, key deliverables & engagement focus areas	Weeks 1-2	▲ Sr. Executive Checkpoint
<b>Technical solution</b>	Identify priority use cases, current architecture & define future-state design	Week 2	▲ FHO Checkpoint
<b>Sponsor sign-off</b>	Review with sponsor to validate business case & target-state solution construct	Week 2	▲ Client Checkpoint
<b>MVP and operating model</b>	Build MVP, and define operating model, team structure, milestones & delivery approach	Week 3	▲ FHO Checkpoint
<b>Internal review and refinement</b>	Conduct internal review with pod owner & incorporate feedback	Week 4	▲ Sr. Executive Checkpoint
<b>Kick off MVP rollout and integrate storyline</b>	Kick off MVP rollout and consolidate cross-pod inputs into a cohesive, integrated executive storyline	Week 4	

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Investor Day

# 03.

## Co-Creation

Co-Creating the Transformation

# A Structured **Four-phased Workplan** Across Use Cases



## Phase 1

### Anchor and architect

Ensure stakeholder alignment at the client (on selected set of AI opportunities), assign team capacity to pods and develop reference business and tech frameworks for each pod to use



## Phase 2

### Conduct pod sprints

Develop end-to-end proposal for each AI opportunity incl. solution vision, business case, and delivery approach



## Phase 3

### Finalize and integrate

Consolidate solution narratives and develop overarching proposal sections incl. executive summary, Coforge's credentials



## Phase 4

### Pilot mobilization and run

Transition selected opportunities into pilot execution through operational mobilization and commercialization readiness

# A Well-defined Timeline for **Close Client Co-Creation**

ILLUSTRATIVE FOR ONE OPPORTUNITY

	Scope element	Milestone	Duration	
INSIGHTS	Stakeholder intel 	Map <b>current workflow</b> , key personas & engage the client to <b>identify key pain points</b>	Week 1	<b>Checkpoints</b>  PMO Checkpoint  Sr. Executive Checkpoint   PMO Checkpoint  Client Checkpoint   PMO Checkpoint  Sr. Executive Checkpoint
	Business value 	Define <b>core problems</b> , <b>user needs</b> , quantify impacts and <b>success metrics</b>	Week 1	
PROVE VALUE	Scope definition 	Set <b>scope boundaries</b> , <b>key deliverables</b> & <b>engagement focus areas</b>	Weeks 1-2	
	Technical solution 	Identify priority use cases, current architecture & <b>define future-state design</b>	Week 2	
	Sponsor sign-off 	<b>Review with sponsor to validate business case</b> & target-state solution construct	Week 2	
	MVP and operating model 	Build <b>MVP</b> , and define <b>operating model</b> , <b>team structure</b> , milestones & <b>delivery approach</b>	Week 3	
REVIEW	Internal review and refinement 	Conduct internal review with pod owner & <b>incorporate feedback</b>	Week 4	
	Kick off MVP rollout and integrate storyline 	Kick off <b>MVP rollout</b> and consolidate cross-pod inputs into a <b>cohesive, integrated executive storyline</b>	Week 4	

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# The Outcome: A True AI-Led Transformation

## A Portfolio of AI Initiatives

### FIVE INITIATIVES

- Advisor experience and next-best-action engine
- Agency accounts
- Trade process automation
- Transfer agency sales data analysis solution
- Sales data analysis

## B Business-Centric Outcomes

### THREE VALUE LEVERS

- **Client experience** via advisor intelligence & personalization
- **Revenue growth** via better pipeline & account prioritization
- **Cost & efficiency** via automation of trade operations

**A True AI-Led Transformation: AI embedded into core business workflows**

**Not something we sold.** But a transformation we shaped progressively: **idea** → **use case** → **workplan** → **execution**

# 02.

## The Outcome

A True AI-Led Transformation

### A Set of **Business-Oriented** Transformational AI Initiatives

<b>WEALTH MANAGEMENT</b>	<b>1</b> <b>Advisor experience and next-best-action engine</b> Equips advisors with insights on client behavior and preferences, helping prioritize outreach and recommend relevant investment actions through an intelligent, dynamic interface	<b>2</b> <b>Agency accounts</b> Enable the Wealth Platform to provide an AI-led, self-directed and advisor-directed account management in a streamlined manner across portfolio construction, trade surveillance, and compliance while automating client communication channels
<b>INVESTMENT MANAGERS</b>	<b>3</b> <b>Trade process automation</b> Automation of the traditional fund trading flow to reduce risk and lower staffing costs through reimagining the workflows of the oldest IMS functional area, with an eye on leveraging the automation in other areas of the client	<b>4</b> <b>Transfer agency sales data analysis solution</b> Enables sales teams to track investment flows, identify distributor trends, and assess sales performance
<b>FOUNDATION</b>	<b>5</b> <b>Sales data analysis</b> Enables deeper visibility into pipeline and growth levers, while equipping sales teams with AI-driven insights to improve productivity and outcomes	
	<b>AI governance &amp; foundry</b> Provides a structured, enterprise-grade framework for designing, deploying, managing, and scaling AI agents across the firm. It ensures that agent-based AI innovation moves fast – but within clearly defined guardrails for risk, compliance, security, and accountability	

# The Blueprint for AI-led Transformation

## A repeatable, six-step approach – scalable across clients

### 1 Start with Business Ambition

- Anchor on growth, margin, experience
- Translate into value pools

### 2 Structured Use Case Discovery

- Broad ideation → rigorous prioritization
- Focus on 5–8 high-impact initiatives

### 3 Co-Create with the Client

- Business leaders, SMEs, external partners
- Iterate quickly

### 4 Build the Transformation Workplan

- End-to-end lifecycle: business case → pilot → scale
- Clear workstreams with execution ownership

### 5 Embed into Client Operations

- Align with platforms, data, org structure
- Productionization, not pilots

### 6 Position Coforge as Partner

- Not just delivery. Not just consulting.
- Orchestrator of AI-led transformation

Coforge as **the orchestrator of AI-led business transformation** — beyond delivery, beyond consulting



Our Impact

How We Deliver It

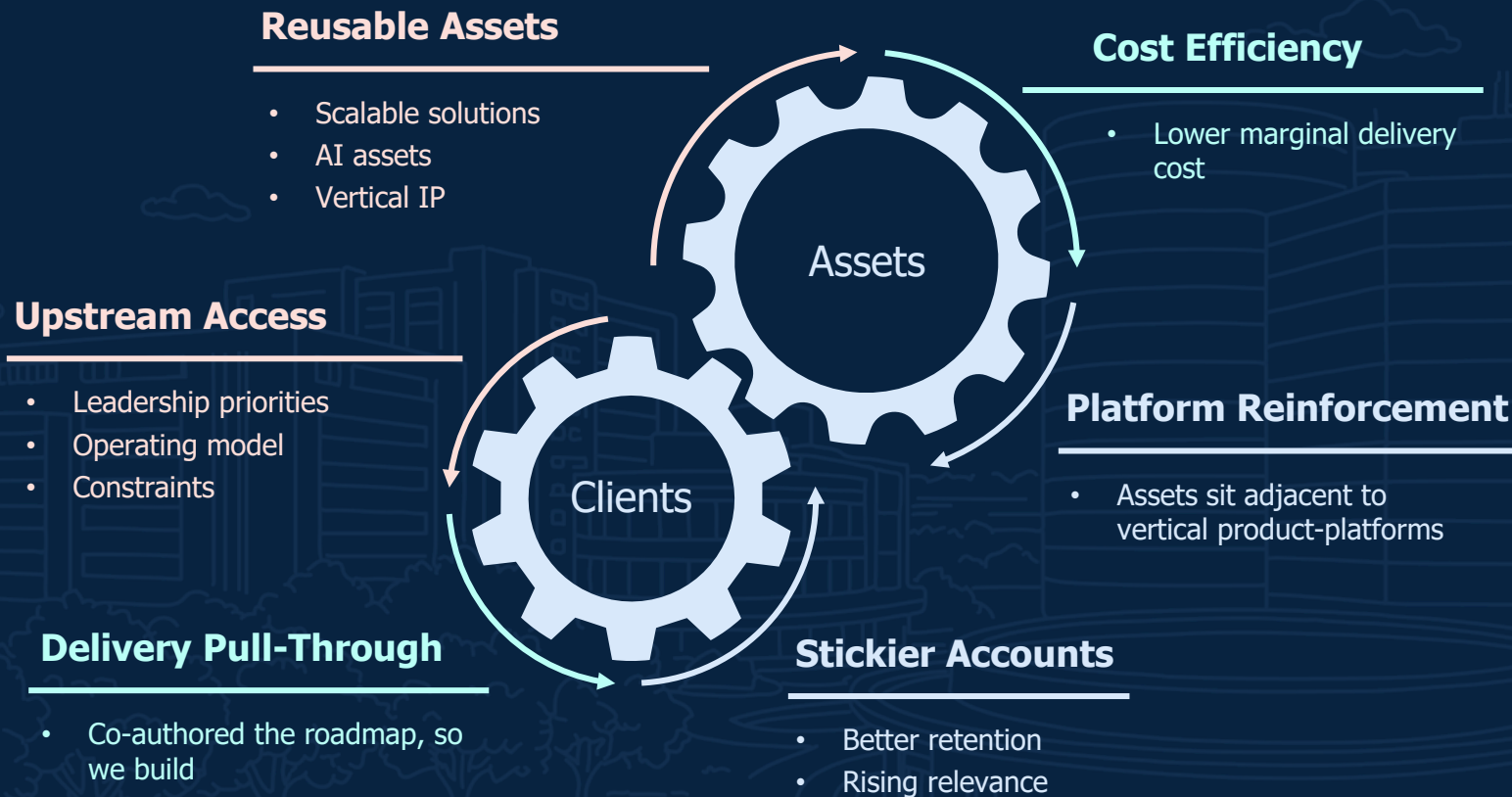
The Engagement Model Evolved

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**Why It Matters To You**

# Two Reinforcing Flywheels. One Value Creation Engine.

← **Upstream Entry Motion: Co-Author the AI Transformation** →



**Stronger Economics,  
Built to Scale and Last**

- **Recurring, embedded**
- **Mission-critical, board-funded**
- **Tied to the agenda**
- **Scalable via reusable assets**

**We co-author the ambition**  
– way before work gets commoditized

# Let's engage!

