

FINTECH MARKETING COMMUNITY ROUNDTABLE SUMMARY NOTES

Date: 08 April 2025

Location: Boston

In a high-impact, exclusive *Marketing & Business Leadership Roundtable* hosted by the Fintech Marketing Community in Boston on 8th April, senior leaders and experienced practitioners came together to explore the evolving role of artificial intelligence (AI) and its inevitable challenges across the fintech marketing landscape.

Convened in partnership with sponsors *Risk.net* and *Chartis Research*, the session featured an insights-driven discussion on key trends, innovations, and strategic challenges currently shaping the industry.

The age of Agentic AI

Matthew Rhodes-Kropf, Associate Professor at MIT Sloan School of Management, commenced the session with a thought-provoking keynote discussing the proliferation of AI across industries while making the case for traditional non-AI enterprises as well.

Rhodes-Kropf emphasised that the industry is at a pivotal moment in history—a time he likened to the advent of the Internet. “With AI, we’re undergoing a tectonic shift,” he noted, highlighting how this transformation will redefine competitive dynamics and business models across the fintech landscape.

He said a windfall of innovation, ingenuity, and creativity is already underway. However, even though AI-native companies are emerging, purpose-built to leverage artificial intelligence from the ground up but non-native AI and traditional firms are far from left behind. They, too, have significant opportunities to evolve and thrive, he added.

Practical imperatives

Rhodes-Kropf said organisations must think about AI implementation with a focus on adopting agentic AI co-pilots like Cursor or Windsurf to augment productivity. Boosting existing systems with AI tooling for enhanced capability and developing custom AI agents tailored to the organisation’s existing software and user experience is becoming pivotal.

He added that developing in-house Agentic AI capabilities can have multiple benefits, including writing systems that use existing software alongside that of users, building agents that gather and summarise information, generating reports from a company's own platform and creating tools that anticipate the user's next step—and subsequently execute it.

Agentic AI systems are not just add-ons but provide foundational shifts in how businesses can create value and deliver outcomes, Rhodes-Kropf concluded.

AI has undoubtedly transformed many facets of B2B marketing, bringing with it both significant advantages and notable challenges. A panel of senior marketing leaders featuring Stuart Jones, CEO and Founder of 360Sigma; Lorelei M. Lenzen, Chief Marketing Officer at Chatham Financial; and Alyssa Gilmore, Global Head of Communications - Financial Products at Bloomberg, explored use cases and real-world applications of AI in marketing and communications while offering a practical yet visionary look at the technology's evolving role in the industry.

Productivity and limitations

AI is highly effective at summarising content and reducing manual, administrative tasks while enabling marketers to scale operations and interactions more efficiently. However, even after its several iterations, the panel believed that, currently AI lacks emotional intelligence and human nuance, which is critical in crafting compelling messaging.

Solely relying on AI-generated content risks damaging brand reputation or creating content that may feel impersonal. Human oversight remains essential to ensure tone, timing, and contextual sensitivity are preserved, the panel emphasised.

Messaging and governance are crucial

The panel believed AI should not be touted as the end solution; rather, focus should be on the use cases and tangible benefits that AI enables. Copy and messaging still need human proofing and oversight.

As AI becomes more integrated, governance and ethics become critical. One panellist pointed out "Governance doesn't wait for government." Organisations must implement internal processes and prioritise compliance across workflows. Education and transparency are key to maintaining trust and ethical use across marketing functions.

Looking ahead - augmentation over replacement

Organisations must invest in prompt engineering to better guide AI tools and focus on using AI to amplify human creativity, not replace it, the panel said. Maintaining a commitment to meaningful, human-centred interactions, even as AI helps scale them, is essential.

Ultimately, AI must be viewed as a force multiplier—one that frees marketers to spend more time where they add the most value: crafting strategic narratives, fostering relationships, and building brands that resonate.

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