

The Human Glue in AI

How Soft Skills Drive Impact in Financial Services

Dr. Lovedeep Saini

Chief Analytics Officer @ Conner Strong & Buckelew

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Where does AI progress depend on people?

- Understanding the business need
- Agreeing across teams
- Building confidence in the result
- Changing everyday work

A quick vote: which one is hardest in your organization?

Before AI acts, people need to agree

Imagine an agent sending a client email or updating a business record.

What good looks like

Define a useful, accurate result.

What AI may do

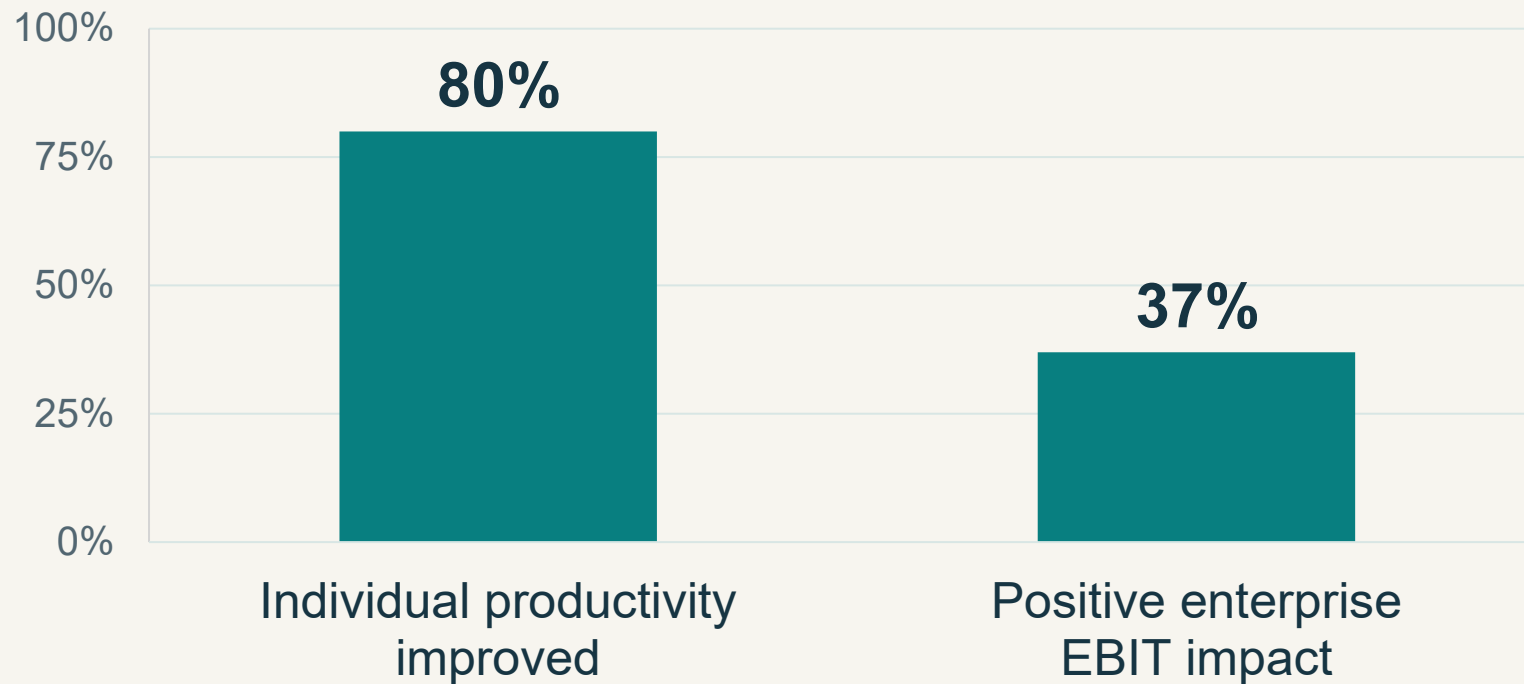
Agree on actions and approval limits.

Who is responsible

Name the reviewer and decision owner.

An AI agent's authority starts with a human agreement.

The gap between capability and business impact



After the faster draft...?

Reviewer repeat the work?

Use freed capacity?

Turnaround improvement?

Have we improved the whole process, or one person's task?

Four human skills connect AI to useful work

Translation

Define a useful task

Collaboration

Deliver together

Emotional intelligence

Understand concerns

Communication

Make evidence and decisions clear

Translation begins with better questions

- What needs to improve?
- How does the work happen today?
- What makes a result useful?
- Who will act on it?

Translation begins with better questions

“Review this document” can mean several different jobs.

What “review” should mean?

EXPIRING POLICY

SIMPLIFIED EXCERPT - FICTIONAL TRAINING EXAMPLE

CEDARBRIDGE MANUFACTURING

Commercial property - selected terms

Property limit

\$10,000,000

Property deductible

\$25,000

Comparison reference

E-01

Selected fields only. No actual policy or client information.

Other terms and conditions are outside this example.

RENEWAL POLICY

SIMPLIFIED EXCERPT - FICTIONAL TRAINING EXAMPLE

CEDARBRIDGE MANUFACTURING

Commercial property - selected terms

Property limit

\$10,000,000

Property deductible

\$100,000

Comparison reference

R-01

Selected fields only. No actual policy or client information.

Other terms and conditions are outside this example.

- comparing changes?
- making a recommendation?

What should the reviewer flag?

A flagged change still needs a shared decision.

Collaboration turns a finding into an action

Business	Technology	Risk and review
Useful task and outcomes	Reliable delivery	Acceptable boundaries
Domain exceptions	Data and integration	Evidence and approval
Business owner	Operating owner	Review owner
What changed?	Can we trace it?	Who approves?

Shared criteria. Clear handoffs. A decisive action.

Scaling AI

Shared foundation

- Access and integration
- Evaluation and monitoring
- Support and operation

Local expertise

- Workflow and exceptions
- Acceptance criteria
- User feedback

What can teams share, and where do their needs differ?

Resistance contains useful information

“I don’t trust it.”

“This creates more work.”

“What happens to my role?”

Listen to the concern before explaining another feature.

Make the next person's work easier

Using the tool

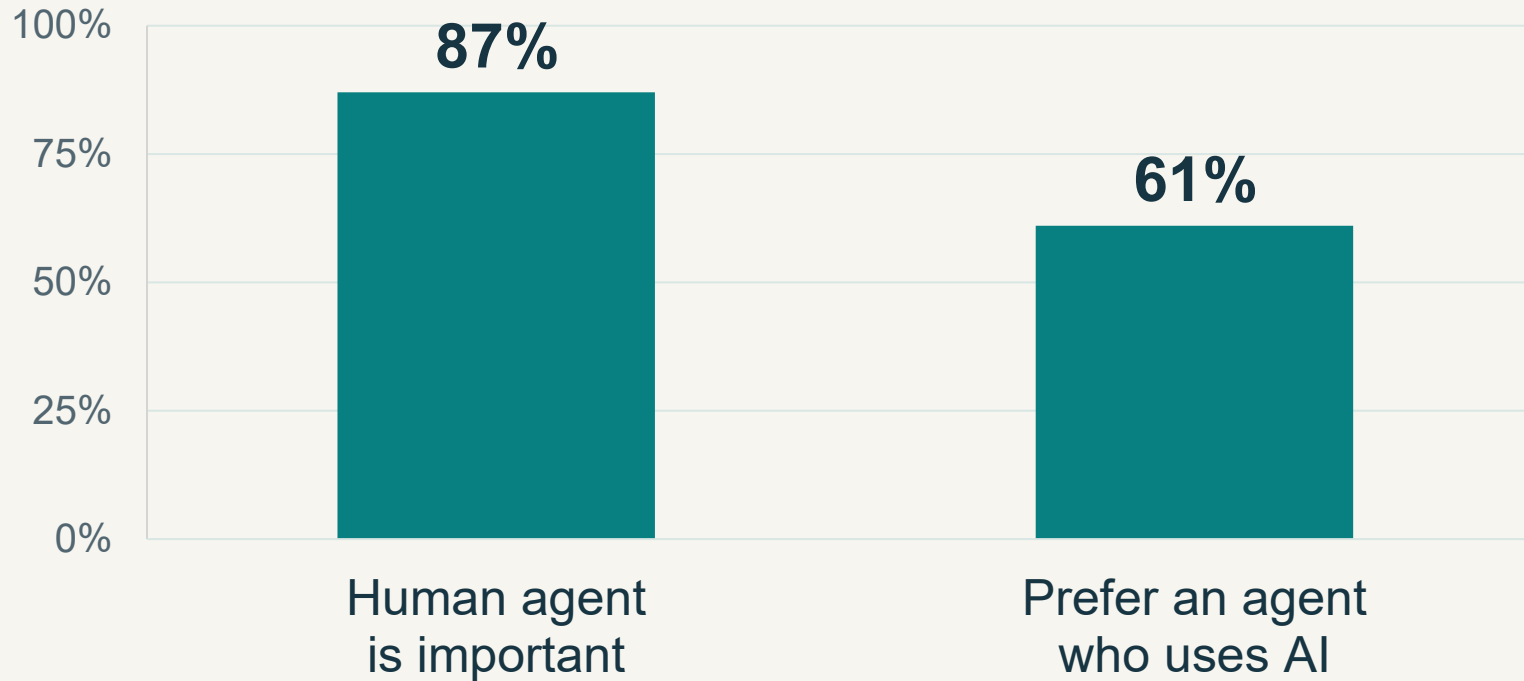
- Give clear instructions & context (prompting)
- Understand hallucinations, limitations & possible biases (AI literacy)
- Verify before acting

Sharing results

- Explain changes
- Show evidence, share uncertainties & missing information
- State next action - who reviews it & what happens next

Responsible AI!

Human guidance remains part of the value



Better preparation

- Useful conversations
- Clear accountability

Better preparation creates room for better advice.

What conversation will you start at your organization?

Clear task. Shared outcomes. Trusted results. Define change and action.

Human skills: listen & translate, collaborate, empathy and communication, emotional intelligence, coaching and leading change.

Thank you!

Dr. Lovedeep Saini
Conner Strong & Buckelew