

Financial Services User Group

March 19, 2026

boomi

© 2026 Boomi, LP or its affiliates. All rights reserved.

Agenda



01

Welcome/ Networking

02

Financial Services and Boomi

03

Data Management in Financial Services

04

TruStone Financial Credit Union

05

Q&A

Networking

Financial Services and Boomi

Key trends in FS with Boomi

The technological enabler that allows for agility and innovation

Core Independence



Break legacy vendor strangleholds for agility

Accelerate addition of Fintech without brittle point to point custom code

Utilize best in breed technology innovations with serial optionality

Mergers & Acquisitions



De-risk M&A strategy while integrate acquisitions without breaking the member experience.

Accelerate tech consolidation and accretiveness of new acquisitions (shorten time to synergy)

Customer Data Mastery



Master data from the center of the Core, LOS, CRM and bank ledgers

Address the spread of member data across dozens of disconnected silos.

Identify matches, resolved conflicts from a synchronized Golden Record.

Customer Data Mastery

Know our members/customer across a complex ecosystem



“Our NPS scores have risen 5% to our highest ever, with a high correlation to the low-friction digital experiences we’re delivering to our members through Boomi. The result is lower cost and higher member satisfaction.”

Mitch Rosenbaum, Senior Vice President of Marketing and Digital Services, Credit Union of Colorado ([Case Study](#))

Challenge:

Credit Unions are rapidly adding best-of-breed fintech applications (Core Independence) and absorbing new legacy systems from other institutions (M&A). While this creates growth, it spreads member data across dozens of disconnected silos.

Solution:

A Hub to sit at center of the ecosystem. It ingests data from the Core, the Loan Origination System, the CRM, and acquired bank ledgers. Identifies matches (e.g., "Jane Doe" in the Core is the same as "J. Doe" in the Mortgage app), resolves conflicts, and creates a single, trusted "Golden Record" for every member.

Value:

- Increase “Share of Wallet” (revenue growth) with hyper customization across all operating systems and merged entities.
- Increase Member satisfaction and trust (measured through NPS and churned members).
- De-Risk M&A by leaving acquired bank's core running in the background while still unifying the member experience. Acquired members' data in your main CRM immediately, without waiting for a 12-month core conversion.

Driving business value with DataHub


Leveraging Unified Data for Informed Decisions and Operational Efficiency



Name	Account #	DOB
John Smith	999999999	7/4/77
Mary Jackson	888888888	10/10/80



Email	Address	Language
SM@test.com	139 Maple Ave	Spanish
JS@test.com	123 Main Street	English



Account ID	Address	Membership
777777	123 Main Street	Premium
444444	139 Maple Ave	Standard



Golden Record

Unique ID	Name	Email	Language	DOB	Address
1010	John Smith	JS@test.com	English	7/4/77	123 Main St.

March Resource Highlights

Boomi Resource Page

The screenshot shows the Boomi Resource Page with a sidebar on the left containing filters for Products, Topics, and Industries. The main content area displays a grid of resource cards. The 'Financial Services' industry is selected in the sidebar. The grid includes articles from Frontier Enterprise, Teachers Mutual Bank Limited, Intelligent CIO, ITBrief, and de Volksbank, among others.

<https://boomi.com/resources/?industry=financial-services>

Agentic Transformation w/ Boomi

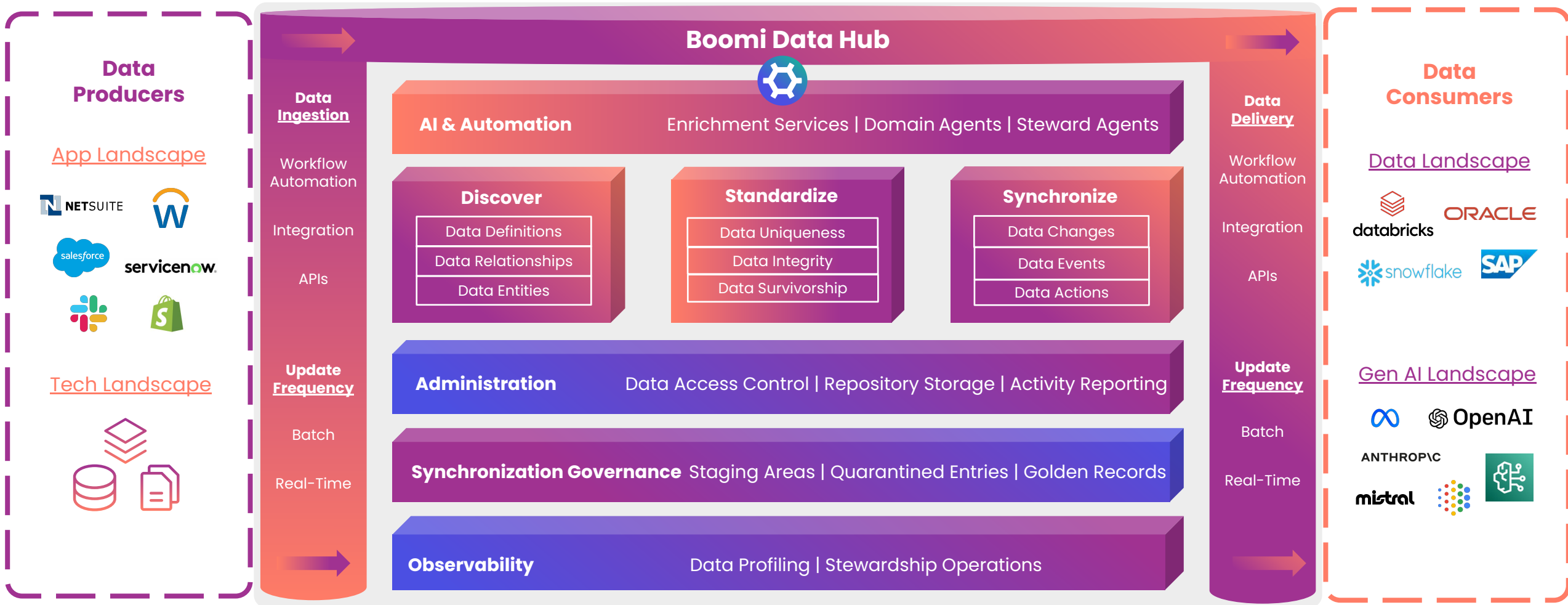
The screenshot shows the Boomi Agent Management page. The hero section has a blue background with the text 'Agent Management' and 'Connect, contextualize, and control agentic workflows at scale.' Below this are buttons for 'Watch webinar' and 'Explore capabilities'. A video player on the right shows a woman working on a tablet with text overlays: '65% Less agent development time', '50% faster issue resolution', and 'Agentifying business processes'. The navigation menu at the bottom includes 'Overview', 'How it works', 'Capabilities', 'Why Boomi', 'Platform power', 'Customer stories', and 'Resources'.

Agent Management
Powered by the Boomi Enterprise Platform

<https://boomi.com/platform/ai/>

Data Management in Financial Services

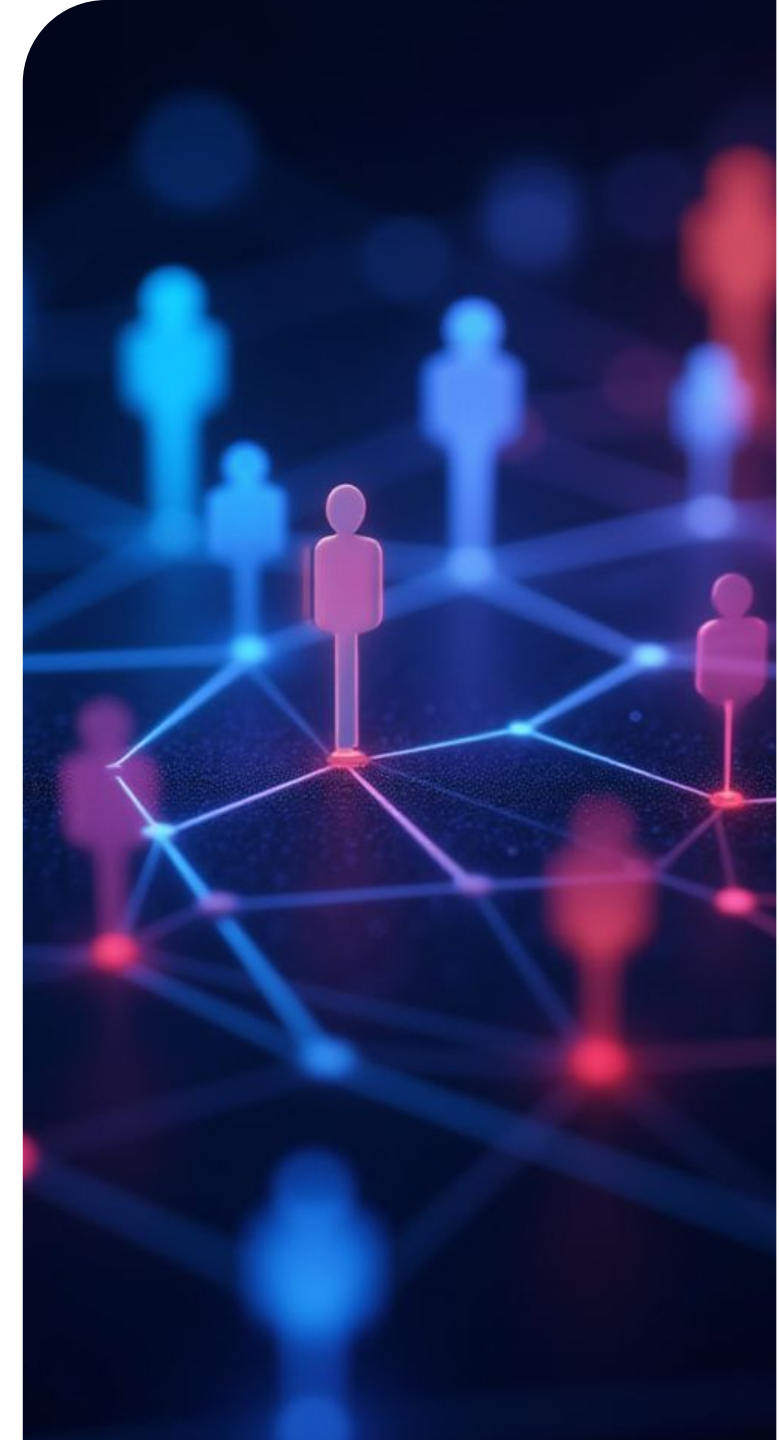
A Foundation for Trusted Data



Data Hub for Financial Services

What it does for your world

<u>Capability</u>	<u>What it solves</u>
Golden Record + Survivorship Rules	One authoritative client, counterparty, or entity record - even across an M&A data estate
Regional Data Infrastructure	Data residency for GDPR and multi-jurisdiction compliance
Governance Task Management	Stewardship exceptions become an assignable, auditable workflow - not a spreadsheet
Audit Trail by Default	Every survivorship decision, every field change, every source contribution - traceable



Data Hub

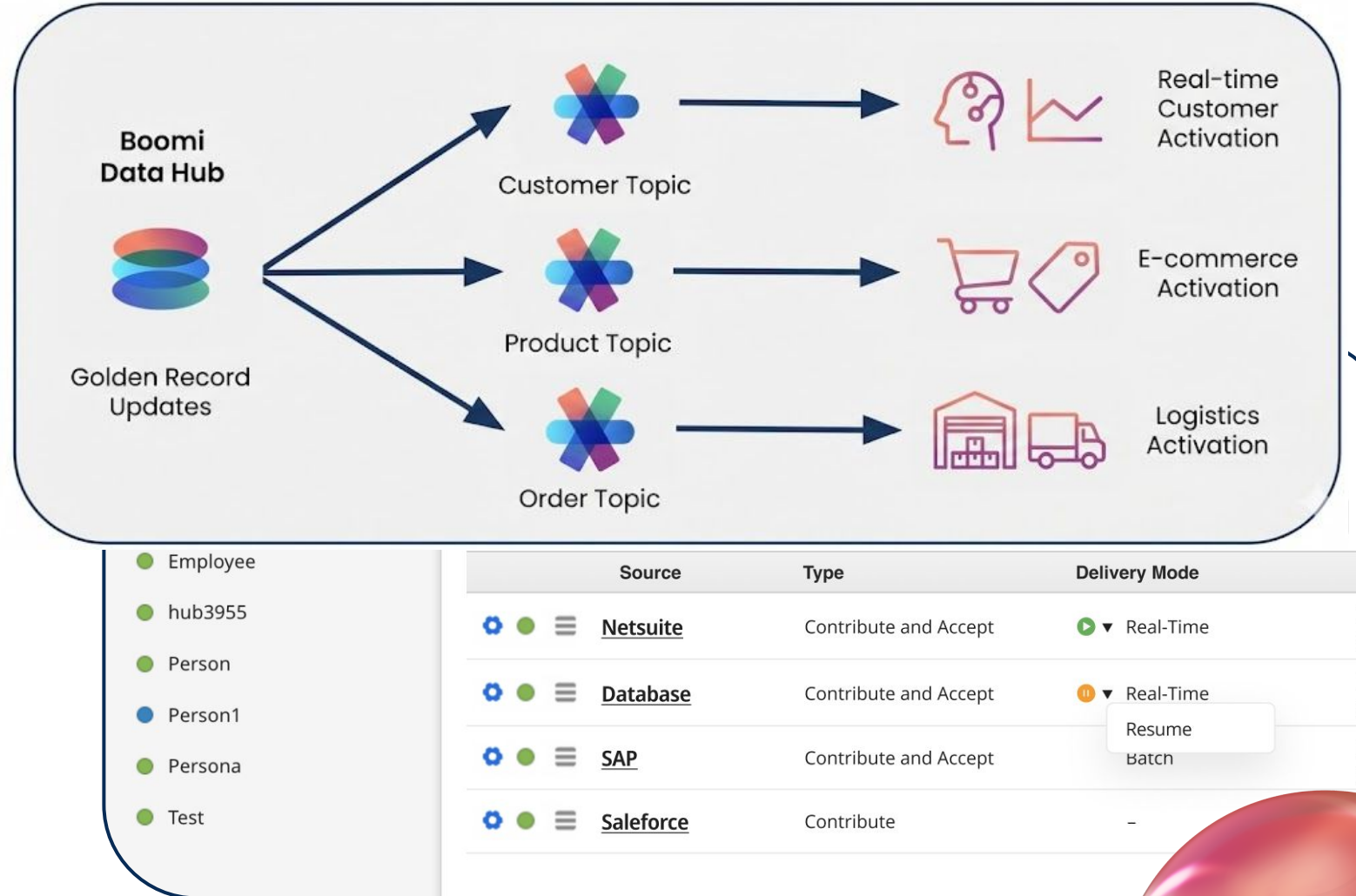
Up Next



Golden Record Event Streaming

Move data at business speed with real-time event streaming and high-performance bulk sync for enterprise-scale AI and analytics.

Begins Q1



Data Hub

Recently Delivered

Command Center Enhancements

Benefits

- **Centralized Discovery:** Surface golden record fields and source metadata within the same tabular view
- **Flexible Search:** Combine free-text search with column filters and use advanced syntax (wildcards, fuzzy matching) to pinpoint records with precision

Availability

- Data Hub privileged stewards can access directly with platform SSO
- Eligible accounts & repositories with accelerated query activated can access free-text search

boomi | Command Center Record 360

Repositories / HubDemo / BikeSales

Golden Records

Search Golden Records

Record Title	Updated Date	Created Date	Sources	Sale ID	Date	Customer...	Bike Model
100001 - Cruiser - San Antonio	27 Aug 2025 18...	27 Aug 2025 18...	CSV	100001	2022-02-09	3091	Cruiser
67694 - Electric Bike - Los Angeles	27 Aug 2025 17...	27 Aug 2025 17...	2 Sources	67694	2020-11-03	1405	Electric Bike
50560 - BMX - Chicago	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	50560	2023-11-08	2223	BMX
24137 - Folding Bike - Chicago	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	24137	2020-11-08	3590	Folding Bike
99356 - Cruiser - Los Angeles	27 Aug 2025 17...	27 Aug 2025 17...	2 Sources	99356	2024-09-02	3728	Cruiser
31808 - Road Bike - Phoenix	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	31808	2020-03-10	5258	Road Bike
9346 - Folding Bike - Chicago	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	9346	2020-02-11	8767	Folding Bike
15789 - Road Bike - Chicago	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	15789	2021-10-24	7091	Road Bike
58122 - Hybrid Bike - Chicago	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	58122	2021-09-05	4254	Hybrid Bike
93903 - Cruiser - Houston	27 Aug 2025 17...	27 Aug 2025 17...	2 Sources	93903	2020-11-30	5277	Cruiser
87251 - BMX - New York	27 Aug 2025 17...	27 Aug 2025 17...	2 Sources	87251	2020-11-17	8600	BMX
74485 - Mountain Bike - Los Ang...	27 Aug 2025 17...	27 Aug 2025 17...	2 Sources	74485	2022-08-15	3545	Mountain Bike
55438 - Folding Bike - Philadelphia	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	55438	2024-08-04	6247	Folding Bike
60370 - BMX - Los Angeles	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	60370	2020-04-10	1867	BMX
18026 - Road Bike - Chicago	27 Aug 2025 17...	27 Aug 2025 16...	2 Sources	18026	2023-07-31	9762	Road Bike

Powered by ServiceNow

Command Center

Up Next



Business-Driven Data Quality

Drive business-led data quality with personalized governance dashboards and collaborative tasks to ensure trusted outcomes across the enterprise

Coming in 2026

The screenshot displays the Boomi Command Center interface. At the top, it shows 'boomi | Command Center' and 'Record 360'. Below this, there's a navigation bar with 'Repositories / TestHub / Astronaut' and a timestamp 'Updated 16 Oct 2024 12:34UTC'. The main section is titled 'Golden Record' and features a search bar 'Search Golden Records'. A table lists records with columns: Record Title, Updated Date, Created Date, Sources, Full Name, and First Name. A 'Show/Hide Columns' dropdown menu is open on the right, showing options like 'All Fields Column', 'Record Title', 'Updated Date', 'Full Name', 'First Name', 'Last Name', and 'Age'. Below the table, there's a 'Powered by ServiceNow' footer and a data model diagram showing relationships between 'Distributor', 'Product', 'Marketing', and 'Customer' entities.

Record Title	Updated Date	Created Date	Sources	Full Name	First Name
Evelyn.Ashford	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	AWS	Evelyn D. Ashford	Evelyn
Keller.Hellen	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	3 Sources	Hellen Keller	Hellen
Massimino.Michael	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	3 Sources	Michael J. Massimino	Michael
Summer.Donna	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	Pendo	Donna N. Summer	Donna
Kahlo.Frida	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	2 Sources	Frida Kahlo	Frida
Jung.Carl	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	Pendo	Carl Jung	Carl
Ashly.Rima	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	Salesforce	Rima K. Ashly	Ashly
Paul.Alice	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	2 Sources	Alice C. Paul	Alice
Ramcar.Gordon	23 Feb 2024 07:06:04	17 Apr 2021 10:17:28	AWS	Gordon D. Ramcar	Gordon

Items per page: 50 | 1-50 of 300

Powered by ServiceNow

```
graph TD; Distributer -- UPC --> Product; Product -- Order --> Customer; Marketing -- Campaign --> Product; Marketing --> Customer;
```

Data Hub

Up Next

Augmented Stewardship & Discovery

Accelerate data tasks with augmented metadata options like enhanced Command Center discovery and guided entity resolution workflows

The screenshot displays the boomi Command Center interface for managing Golden Records. The top navigation bar includes the boomi logo, "Command Center", and "Record 360". The breadcrumb trail shows "Repositories / TestHub / Astronaut". The page is titled "Golden Record" and was last updated on 16 Oct 2024 at 12:34UTC.

A search bar for "Search Golden Records" is located at the top. Below it is a table of Golden Records with columns: Record Title, Updated Date, Created Date, Sources, Full Name, and First Name. The table lists three records: Evelyn.Ashford, Keller.Hellen, and Massimino.Michael.

A "Quarantine" modal is open, showing a list of quarantined records. The table has columns: Quarantined Date, Source, Entity ID, and Cause. One record is selected: 11 Dec 2024 14:55:22 from HubSpot with Entity ID C01412.

A "Merge Records" modal is also open, titled "Golden Records / Merge". It prompts the user to "Select the fields from each record to merge a new golden record." A warning message states: "Some fields have different values. Select the values you want to use from each record to a merge a new golden record." The table below shows fields to be merged from three records:

Field Name	Status	Record 1: Hellen.Keller	Record 2: Hellen_Keller	Record 3: HellenKeller
Source Entity ID		(3) Selected	(1) Selected	(1) Selected
First Name		<input type="checkbox"/> Hellen	<input type="checkbox"/> Hellen	<input type="checkbox"/> Hellen
Last Name		<input type="checkbox"/> Keller	<input type="checkbox"/> Keller	<input type="checkbox"/> Keller
SSN		<input type="checkbox"/> 222-33-4455	<input type="checkbox"/> 222-33-4455	<input type="checkbox"/> 222-33-4455
Email	Conflict	<input type="checkbox"/> Hellen.Keller@hotmail.com	<input type="checkbox"/> Hellen.Keller@gmail.com	<input type="checkbox"/> Hellen.Keller@gmail.com

Expand Data Insights

Source Linkage & Resolution Tracking

- View & understand information about the sources that contributed data to the golden record
- Leverage source linkage and resolution tracking to promote data tracing and understand data transformation procedures

boomi | Command Center Record 360

[2f136aee-67df-4bd4-b196-5cbb67231833](#) / Sources Updated 03 Apr 2025 11:22:27

Sources | Massimino, Michael [Sources](#) [History](#)

Source	State	Established Date	Entity ID
MySQL	ESTABLISHED	01 Jul 2019 16:20:29	2f136aee-67df-4...
NASA	ESTABLISHED	03 Sept 2017 00:42:08	Michael J. Massi...
Salesforce	ESTABLISHED	13 Jun 2019 15:30:13	2f136aee-67df-4...
Checker Service	PENDING		

Expand Data Insights

Historical Metadata

- Employ historical metadata analysis to understand the historical context of data
- Historical metadata analysis supplies a deeper understanding of how data has evolved over time

boomi | Command Center Record 360 GB

2f136aee-67df-4bd4-b196-5cbb67231833 / History Updated 02 Apr 2025 16:13:57

History | Massimino, Michael

[Sources](#) [History](#)

Changes Record Activity

Field	Current Value	Previous Value	Last Update...	Last Updated ...	Change History
Purple Drink Perc...	0%	--	15 Sept 2017 13:0...	MDM	1 Updates
Tang Flavor Prefe...	Kiwi-Strawberry	--	15 Sept 2017 13:0...	MDM	1 Updates
Sugary Drinks pe...	25.0	--	15 Sept 2017 13:0...	MDM	1 Updates
Tang Percentage	99%	--	15 Sept 2017 13:0...	MDM	1 Updates
Gender	Male	Male	02 Sept 2017 23:4...	NASA	Created
Year	1996	1996	02 Sept 2017 23:4...	NASA	Created
Space Flight Hrs	571	571	02 Sept 2017 23:4...	NASA	Created
Birth Date	1962-08-19	1962-08-19	02 Sept 2017 23:4...	NASA	Created
Birth Place	Oceanside, NY	Oceanside, NY	02 Sept 2017 23:4...	NASA	Created
Middle Initial	J.	J.	02 Sept 2017 23:4...	NASA	Created

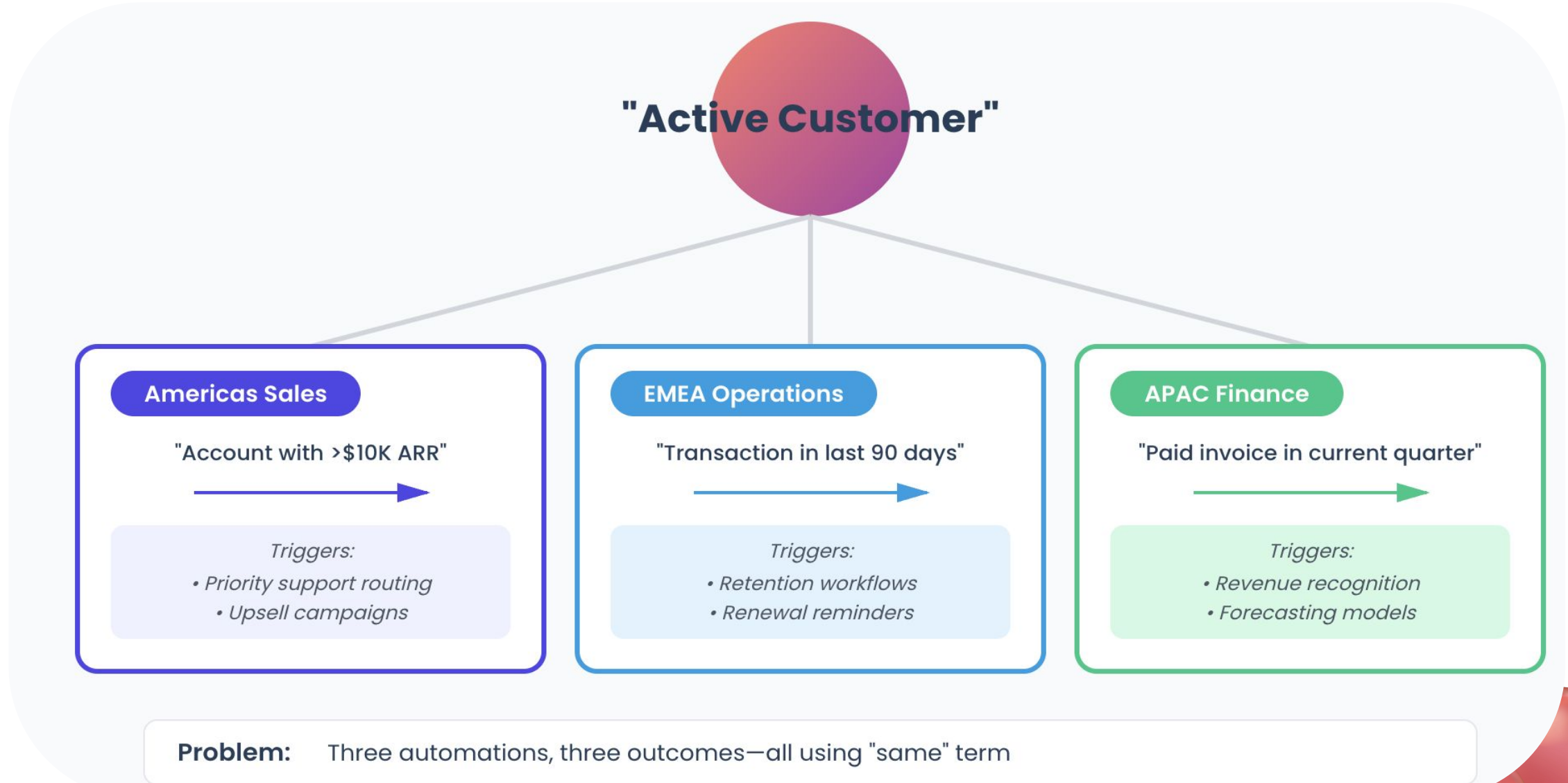
1-10 of 23 < **1** >



Boomi Meta Hub

Key Capabilities

Without Context: One Business Term -> Three Outcomes



The Meta Hub Impact.

Improve Agents Accuracy with Business Context

Problem: Without proprietary context, AI agents hit a reasoning wall, leading to context-free guesses and operational risks.

Solution: Meta Hub bridges this disconnect by feeding agents rich metadata context to improve agent accuracy.

Outcome: Achieve higher reasoning precision and reduce AI rework tax.

Establish One Universal Business Language

Problem: Tribal knowledge creates contextual disconnect, causing manual reconciliation and operational risk.

Solution: Meta Hub serves as a unified system of record for expert-endorsed glossaries to ensure identical definition usage.

Outcome: Eliminating reliance on tribal knowledge and reduce manual reconciliation.

Accelerate Innovation by Eliminating Blind Spots

Problem: Changes can cause unknown downstream consequences thus creating "change paralysis".

Solution: Meta Hub provides universal lineage to track data flows and show changes impact analysis (coming in Q3)

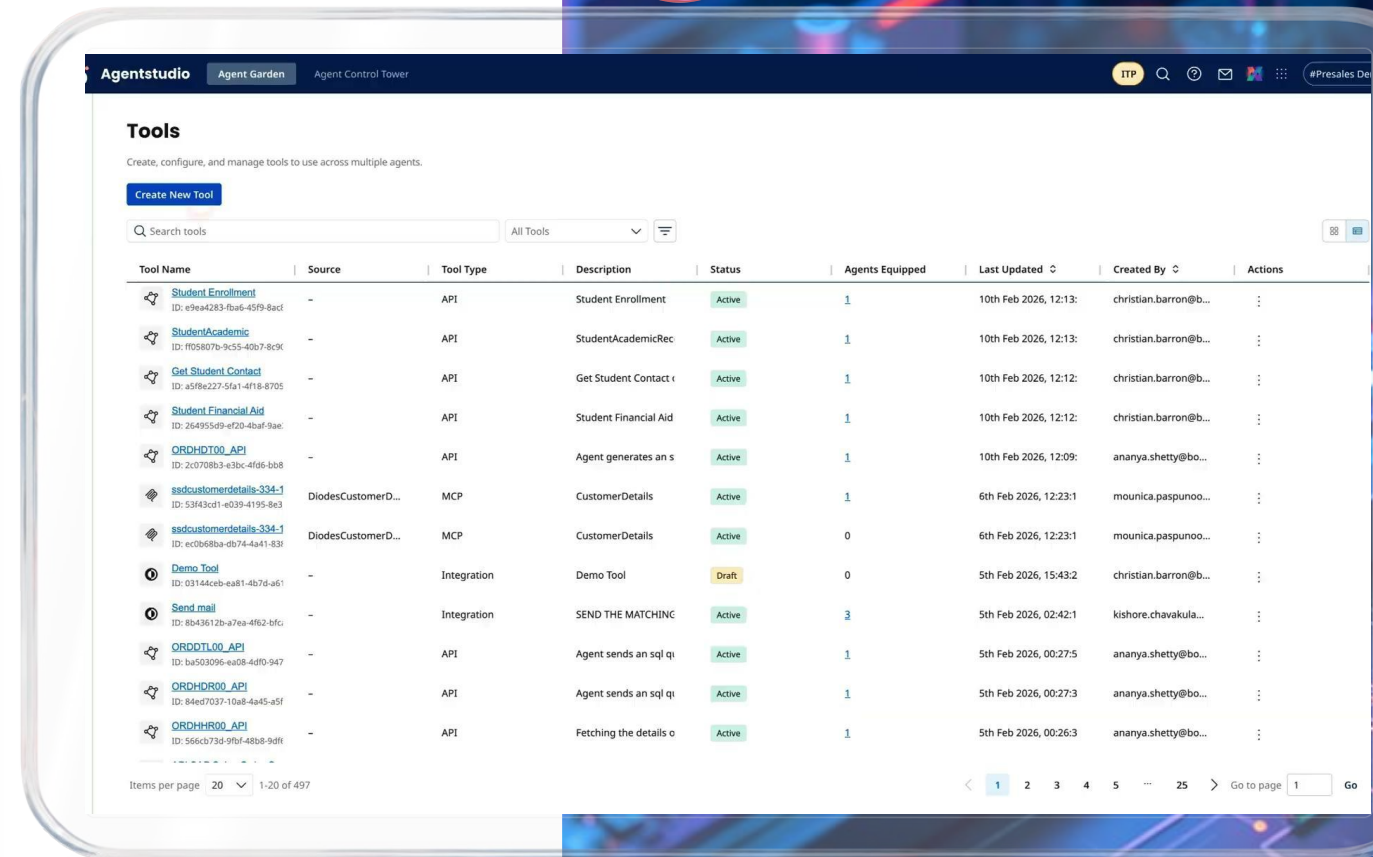
Outcome: Reduce time to market by providing a clear view of changes impact.

Improve Agents Accuracy with Business Context

Business Context for AI Agents

Feed **endorsed, proprietary business definitions** directly into your AI agents to eliminate context-free guessing.

Provide your agents with the business rules required to set agent guardrails, ensuring they **reason accurately and act safely**.



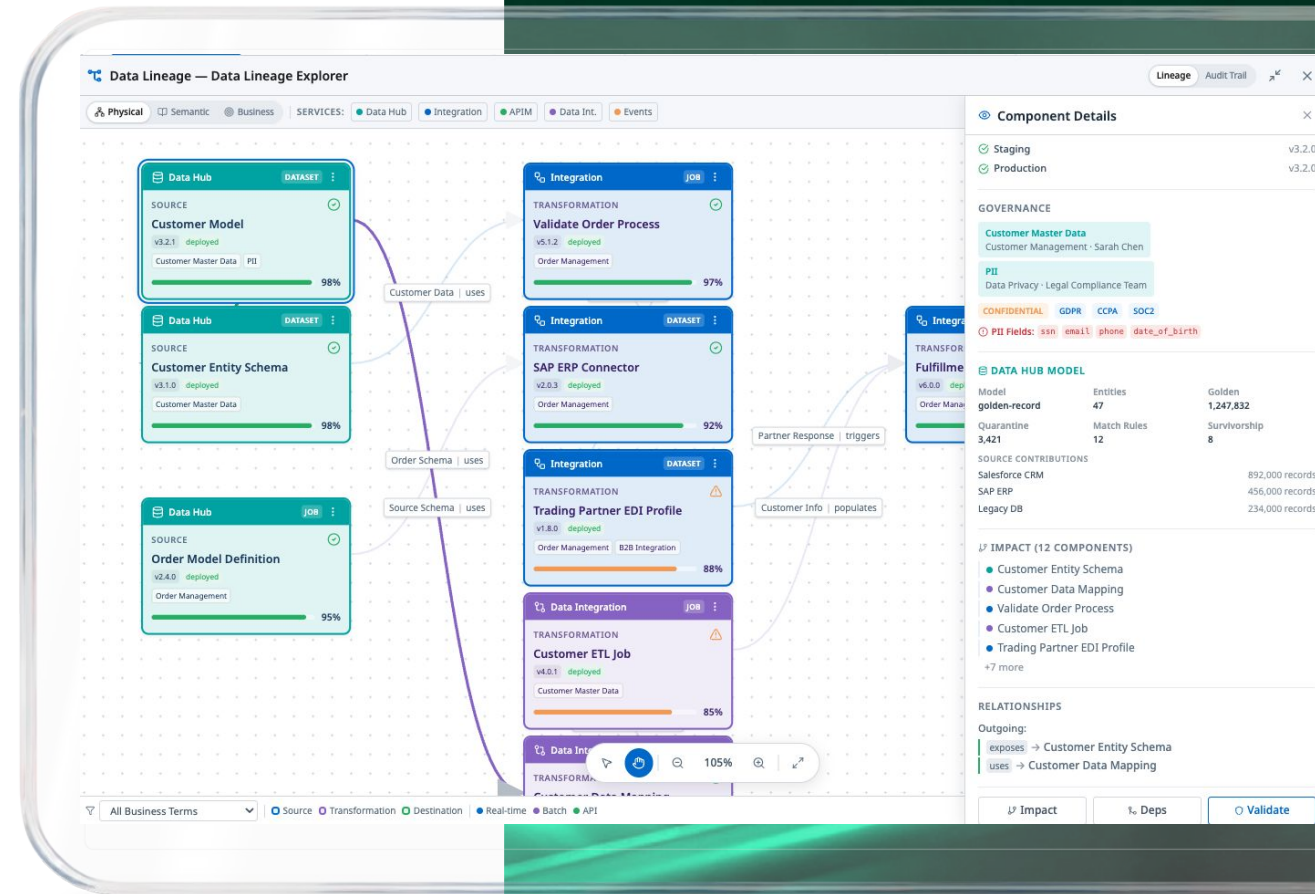
Accelerate Innovation by Eliminating Blind Spots

Universal Lineage

End-to-end mapping of data flows, allowing users and agents to understand downstream consequences

- Backend engine required to track data lineage
- Visual interface for stewards to trace data origin
- Automate the discovery of data relationships from providers to populate lineage.

***Coming 2026 H2**



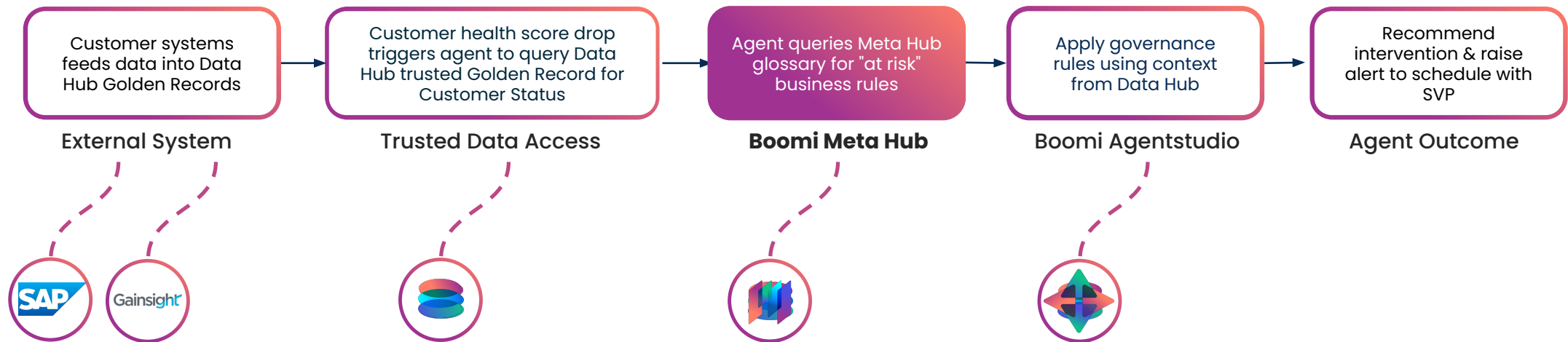
How It Works: **Eliminating Agents Hallucinations**

Example: Churn Risk Agent

Boomi Meta Hub

- Attach glossary to agent using an agent tool, allowing the agent to use glossary rules in the reasoning process
- **Governed and accurate reasoning** is achieved by utilizing centralized business context

Contextual metadata across the automated integration stack



A purple telescope is positioned diagonally across the center of the image. To its right, there are several pink, translucent bubbles of varying sizes. The background is a dark blue gradient with faint white grid lines.

Boomi Meta Hub

EARLY ACCESS

Ground Agents in Business Context

Meta Hub Early Access

Boomi Meta Hub is currently available through an early access program. This program provides early adopters with hands-on access to existing features while helping to shape future enhancements through feedback. Are you ready to ground your agents in business reality?

[Sign Up Today](#)

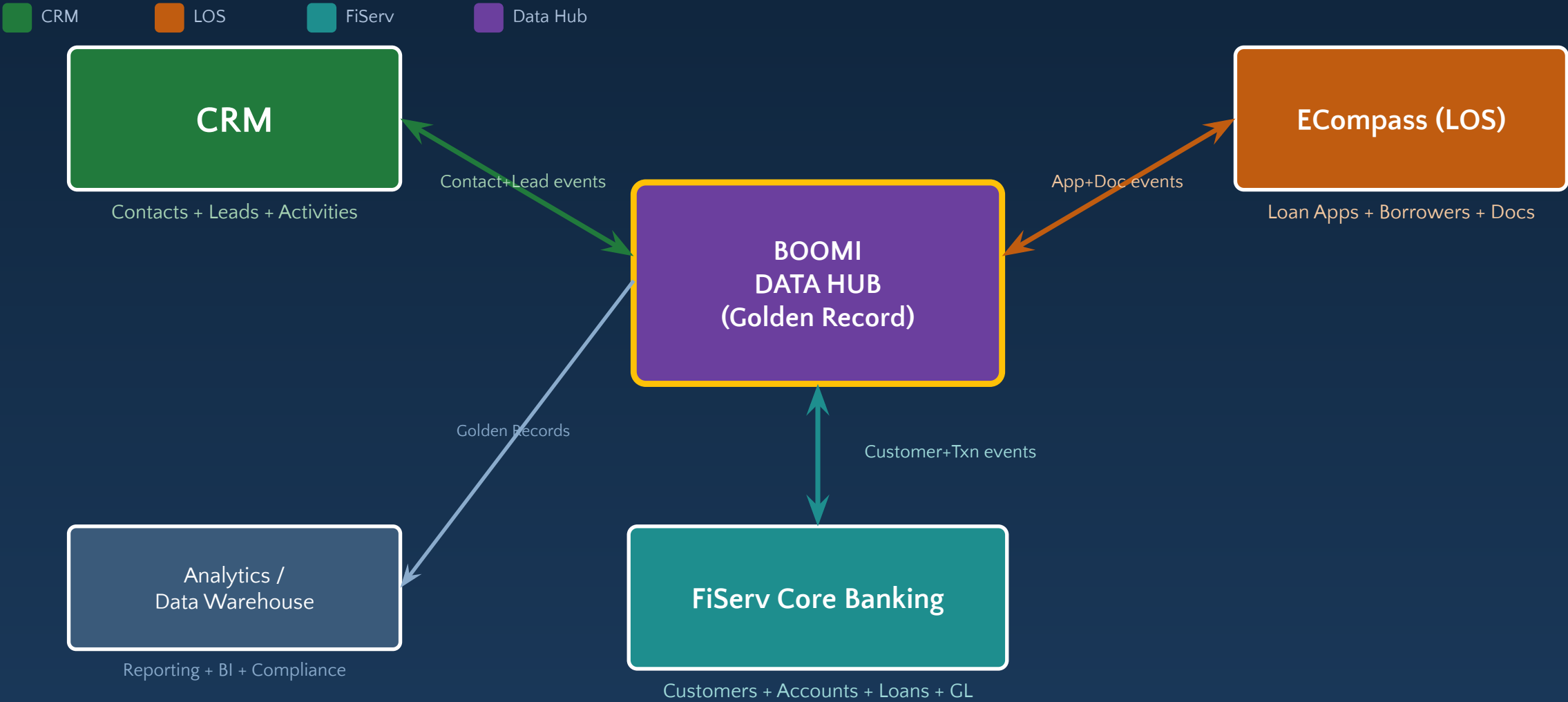


TruStone Use Case

Glimpse to the Next User Group

BANKING + FINANCE | BOOMI DATA HUB INTEGRATION ARCHITECTURE

End-to-End Master Data Management across CRM + LOS + Core Banking



Boomi Data Hub is the authoritative MDM system - all golden records replicated to source systems in real-time

SOURCE SYSTEMS + KEY TABLES

Key entities managed by each system - each is a contributor to Boomi Data Hub golden records

CRM

Customer Relationship Management

crm_user

Staff: Loan Officers, Processors, UWs

crm_contact

Prospects + Borrowers (PII encrypted)

crm_account

Business / Entity groupings

crm_lead

Mortgage pipeline: Prospect to Funded

crm_activity

Calls, emails, meetings, system alerts

ECompass (LOS)

Loan Origination System - ICE Mortgage

los_loan_application

Core app (1:1 with CRM lead)

los_borrower

Primary + co-borrowers per loan

los_property

Subject property details + appraisal

los_loan_document

W2s, paystubs, appraisals, bank stmts

los_loan_condition

UW conditions: PTA / PTD / PTC

los_milestone

Pipeline stages with SLA targets

FiServ Core

Core Banking System - Fiserv

core_customer

Definitive record (created at funding)

core_account

All deposit + loan accounts

core_funded_loan

Post-close servicing + delinquency

core_transaction

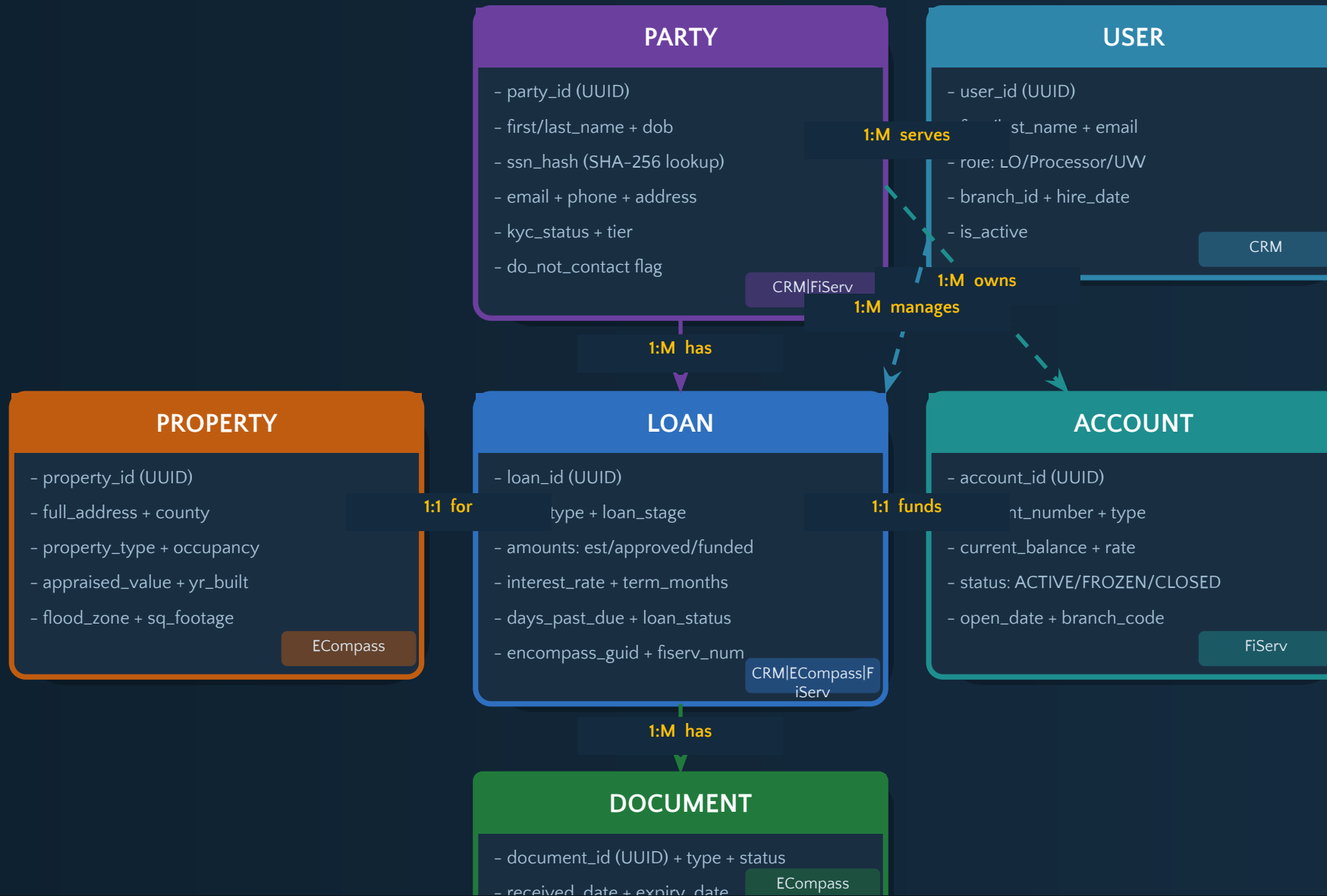
Immutable ledger (BIGINT, high-vol)

core_gl_entry

Double-entry GL linked to transactions

BOOMI DATA HUB – GOLDEN RECORD MODELS + RELATIONSHIPS

Six canonical models with survivorship rules – arrows show cardinality of managed relationships



SURVIVORSHIP: KYC/Legal data -> FiServ wins | Mktg/Contact prefs -> CRM wins | App/Property data -> ECompass wins | Contact info -> Most Recent Update wins

Boomi World 2026

Join us at Boomi World 2026
as we accelerate what's possible
through AI-driven integration,
automation, and intelligence.

Be part of what's next. From breakthrough innovations and bold keynotes to hands-on sessions and dynamic networking, this is where **AI ambition turns into AI action.**

Boomi World 2026

May 11-14, 2026 — Chicago, IL

WHY ATTEND BOOMI WORLD?

Build the Future

See how the **Boomi Enterprise Platform** helps organizations **activate agentic AI** to drive intelligent automation and transformation.

Accelerate What's Possible

Learn from peers and experts who are **connecting data, simplifying complexity, and scaling smarter** across every part of their business.

Connect and Collaborate

Join a **global community of innovators** leading the **next wave of agentic transformation.**

Get Trained and Certified

Boost your expertise through **pre-conference training and certification** on key Boomi technologies to stay ahead in a rapidly evolving landscape.

Boomi World is where vision meets velocity and the future starts moving faster.

[Register Today at BoomiWorld.com](https://BoomiWorld.com)

Financial Services at Boomi World

Monday:

10:00 AM: Pre-Conference Training Day 1
**Additional cost*

Tuesday:

8:00 AM: Pre-Conference Training Day 2
**Additional cost*

6:00 PM: Opening Reception



Wednesday:

9:00 AM: General Session

1:30 PM: Breakouts

3:30 PM: Financial Services
Community User Group



Thursday:

9:00 AM: General Session

1:30 PM: Breakouts

1:30 PM: Financial Transaction
Automation & NACHA using Boomi for
a Petroleum Wholesaler

2:30 PM: Digital Specfile: Building a
Unified Digital Banking Console with
Boomi

3:30 PM: Community Meetup in Lounge

6:30 PM: Celebration Night

Q&A



Thank you