

Investment banking innovation priorities revealed in new report

A new report reveals the need for innovation and collaboration in the investment banking sector to tackle the widespread crisis of operational inefficiency.

NEW YORK, NY, UNITED STATES, February 10, 2025 /EINPresswire.com/ -- [A new report reveals](#)



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*Julien Villemonteix, UpSlide
CEO*

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The survey of more than 300 investment bankers and operational leaders across the US, UK, Australia and East Asia, undertaken by document automation leader [UpSlide](#) and outsourcing partner Williams Lea, shows industry-wide recognition (92% of investment bankers and operational leaders agree) that a large portion of junior bankers’ time is being wasted on repetitive, manual or ‘low-value’ tasks which is draining productivity.

The tasks identified as having the most significant impact on efficiency are data entry and management (identified by 42% of bankers), financial modelling (43%), and pitchbook preparation and editing (25%).

Indeed, [previous research](#) has shown investment bankers can spend up to 40 hours per week on manual tasks.

When it comes to finding solutions to investment banking’s productivity gap, 85% of investment bankers and operational leaders agree technology is the answer to the huge administration overload. With the M&A market on the rise, half of bankers and operational leaders also believe greater investment in technology is the best protection against the future fluctuations of market demand.

Innovation and software investment to make the sector fit for the future

Nearly half (42%) of all those surveyed, both investment bankers and operational leaders, believe greater use of AI and automation will be key to finding efficiencies and meeting challenges as the industry gears up for a potentially busy year. Both bankers (44%) and operational leaders (46%) believe further tech investment can allow teams to better collaborate and improve client

satisfaction.

Investment bankers identify a number of software investment areas that could improve productivity. Almost half (47%) of bankers believe advanced data and analytics tools are key to unlocking efficiency, while 29% believe enhanced communication and collaboration platforms will have a positive impact.

Junior and senior bankers can both see the advantages of technology in shaping the future of investment banking. More than half (55%) of younger, Associate-level investment bankers believe technology can boost client satisfaction and service delivery. More senior Managing Directors believe technology increasing employee retention (65%) is going to be key in an increasingly competitive investment banking landscape.

Stakeholder engagement key for successful change management for new technology
Effective change management for new tech investment and roll-out is essential. Both investment bankers and operational leaders believe stakeholder engagement is key. 43% of bankers say that stakeholder involvement leads to faster tech implementation and seamless integration, while 45% of operational leaders see involving stakeholders as the key to unlocking more practical and relevant technology choices.

More than half (55%) of associates also believe that ensuring a better understanding of tech in the wider workforce cultivates more innovation and creativity within the firm.

Commenting on the data, UpSlide CEO Julien Villemonteix said:

“The investment banking sector finds itself at a crossroads. Following several years during which inflationary pressures and macroeconomic uncertainty has taken its toll on the sector, there is a great deal of dry powder in the market and many anticipate a significant uptick in M&A activity over the course of 2025.”

“At the same time, the last few years have also seen rapid technological development with AI and automation bringing capabilities and efficiencies to the market that are changing the shape of the industry. The challenge for the sector is investing in this tech wisely and in a way that will support investment banks as they look to capitalise on the opportunities that 2025 will bring.”

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“Our latest data also reveals the dilemma within many investment banks as they seek to drive efficiency and become more competitive. Investment bankers, especially those from younger, ‘digital native’ cohorts, have a strong innovation appetite. And while more senior bankers and operational leaders share this enthusiasm, they are also more cautious and keen to maintain a focus on potential organisational efficiencies and on keeping budgets under control.”

“For both bankers and operational leaders, ensuring decisions on tech investment and automation are taken holistically will be key to meeting the challenges of 2025, ranging from increasing M&A volume to technological disruption. There’s a clear understanding of the need for change in the industry, and the role of tech in delivering that change, but making the right investments in the right ways will be critical to achieving it.”

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Notes to editors:
About UpSlide

UpSlide provides the most effective way of working in Microsoft 365 for busy financial services professionals, combining ease of use and reliability with premium setup, seamless integration, and high adoption for long-term success. For the last 13+ years, UpSlide has been helping some of the most well-known companies in financial and professional services to boost productivity, while improving brand consistency across their corporate documents.

As a Microsoft Solutions Partner, UpSlide brings together expertise from the tech, finance and design fields to help clients like KPMG, UniCredit, BNP Paribas, Rothschild & Co., and many more to improve their processes and empower staff to focus on more rewarding tasks.

UpSlide is a certified B Corporation, upholding the belief that businesses should have a positive impact on society.

For more information, please visit <https://upslide.net>

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