

UpSlide Introduces a New Finance-Grade Document Production Layer Accessible via Claude

NEW YORK, NY, UNITED STATES, April 29, 2026 /EINPresswire.com/ -- UpSlide today announced a new approach to document production in financial services, enabling advisory, banking, and investment teams to turn AI-generated drafts into trusted, client-ready deliverables within Microsoft 365.



Financial professionals don't just need faster drafts- they need confidence in what they deliver."

Julien Villemonteix, CEO of UpSlide

As generative AI tools like Microsoft Copilot and Claude accelerate content creation, firms are seeing both the benefits and the strain of rapid adoption. AI can generate a strong first draft - which, in many industries, is often 'good enough'. In financial services, however, where documents are high-stakes and a single error can undermine client trust, that's nowhere near sufficient. For these teams, where the integrity and presentation of every document

reflect the quality of the advice itself, there is a significant gap between AI's promise and its real-world application.

UpSlide addresses this gap by acting as a dedicated document production layer across the entire lifecycle - from initial draft through refinement, review, and final verification.

UpSlide works alongside AI assistants like Claude in PowerPoint, verifying outputs and ensuring drafts are correctly structured, compliant, and aligned with firm standards from the outset, reducing the need for repeated manual fixes during review stages.

By exposing UpSlide's capabilities via MCP, these assistants will be able to extract approved content from libraries, apply and update the correct structure and branding, and maintain data integrity as the document evolves.

Alongside this, UpSlide uses a combination of AI agents and deterministic workflows to support formatting, Excel linking and Track Changes throughout every iteration, ensuring documents remain reliable, auditable, and consistent under scrutiny.

The result is not just a faster first draft, but a more dependable path to final delivery, where

documents are accurate, on-brand and ready to share with confidence.

“AI has transformed how quickly teams can produce a first draft, but financial document creation is not linear. Pitchbooks and due diligence reports evolve through multiple iterations, stakeholders, and layers of review,” said Matteo Bordin, Chief Product Officer at UpSlide. “That’s where we’re seeing both opportunity and friction. There’s enormous enthusiasm for AI, but also a growing need to separate what works in practice from what’s simply hype.. UpSlide ensures documents are not only generated faster, but remain controlled, consistent, and reliable throughout the entire process.”

Being able to access UpSlide’s capabilities through tools like Copilot and Claude within Microsoft 365, enables teams to leverage the speed of AI without compromising on quality. In an environment where new capabilities are constantly emerging, this provides a layer of control, helping firms adopt AI in a way that is practical, governed, and aligned with existing workflows.

“Financial professionals don’t just need faster drafts- they need confidence in what they deliver,” said Julien Villemonteix, CEO of UpSlide. “AI is already proving highly effective for drafting, research, and ideation. But in financial services where the stakes are incredibly high, that’s only the starting point.

There’s growing fatigue around AI capabilities that don’t always translate into reliable, client-ready outputs for finance teams. UpSlide bridges that gap - bringing the structure, control, and verification required to meet the standards of this industry. With over 15 years focused on financial services, we’re solving a problem that generic AI players like Microsoft, Anthropic, or OpenAI aren’t designed to address - and are highly unlikely to prioritise on their roadmap.”

UpSlide is trusted by leading global firms, including KPMG, Deloitte, Rothschild & Co, Alvarez & Marsal, Permira, UniCredit, and Grant Thornton, supporting high-stakes client deliverables across financial and professional services.

As firms scale their use of AI, UpSlide positions itself as the layer that bridges generation and reliability - helping teams move beyond experimentation and deliver consistent, high-quality outcomes at scale.

About UpSlide

UpSlide provides a document production layer for financial and professional services teams, helping them build, refine, review, and verify high-stakes deliverables directly within Microsoft 365.

Working alongside AI assistants such as Microsoft Copilot and Claude, UpSlide combines AI and automation to ensure documents are not only generated quickly, but remain accurate, consistent, and compliant throughout their lifecycle.

For over 15 years, UpSlide has supported some of the world’s leading firms - including KPMG, UniCredit, BNP Paribas, and Rothschild & Co. - to improve productivity while maintaining the

highest standards of quality and brand consistency across their corporate documents.

As a Microsoft Solutions Partner, UpSlide brings together expertise in technology, finance, and design to integrate seamlessly into existing workflows and drive high user adoption, enabling teams to focus on higher-value work.

UpSlide is a certified B Corporation, reflecting its commitment to using business as a force for good. For more information, visit upslide.com.

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