ARTIFICIAL INTELLIGENCE FOR HYPER-PERSONALIZATION IN BANKING

Proof Of Concept For Enterprise Pilots

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THE QUEST FOR HYPER-PERSONALIZED EVERYDAY BANKING

Generative AI's utility within everyday banking can yield great returns by allowing banking stakeholders to assess and extract customer/client/member segmented data for specific tasks and purposes. These tasks and purposes can be further examined upon and executed using Generative AI.

This repeated process will therefore allow everyday banking clients to have access to a boutique high net worth individual approach (digitally) - given that AI will be able to interpret and anticipate their wants, needs and sentiments (solely from their own data) for their short term, long term and prospective banking goals.

Within this presentation, we will explain how our Generative Artificial Intelligence tools does this and how banks, micro-lenders and credit unions can benefit by granting their clients, members and customers each a tailored banking approach with these useful tools.

BANK

BUY

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PILOT FEATURES

- Upload any document.

- Ask any question to the AI program.

- AI program will answer these questions for each document accurately. The accuracy and clarity is tremendous.

- Variety of data sets for clients, stakeholders, employees etc.

- Integrate-able with a variety of other platforms eg. Salesforce, internal banking data via an API.

- Fetch customer data from these platforms.

- Data from a variety of data sets: Client demographics, current/past client relations, transaction history, credit history.

- Perform a variety of calculations
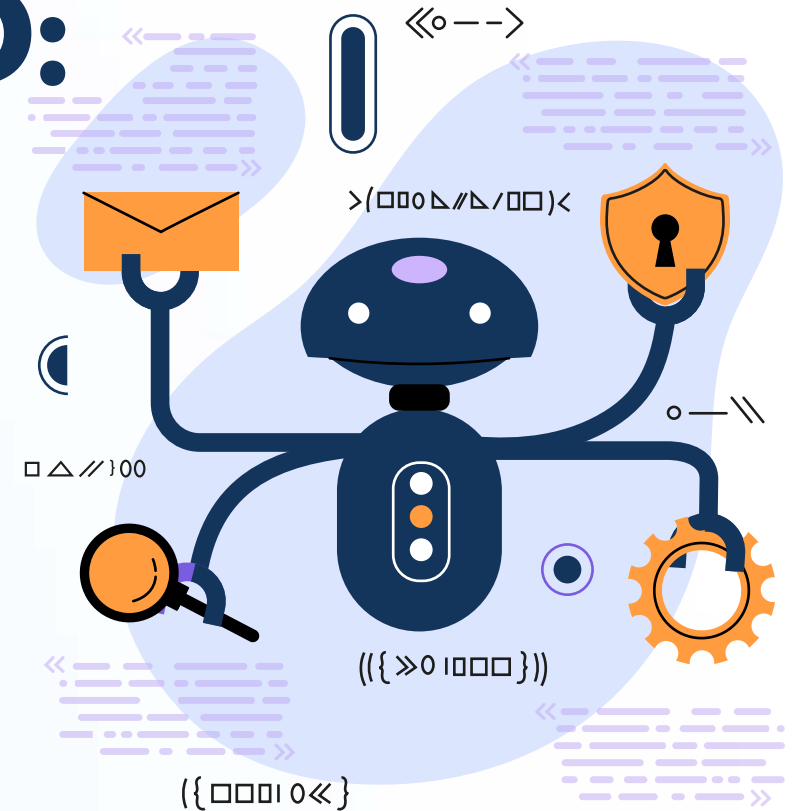
- Process offers, notices and reports.

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LARGE LANGUAGE MODELS (LLMS) USED:

Chat GPT

Fin-GPT

LLama3

Mistral

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USAGE NOTES PART 1

- Select an LLM model.

- Upload and select a document for LLM model's 'diagnostics'.

- Ask strategic questions to the LLM based on specific inquiries regarding the document.

- LLM will responded 100% accurately will clear data.

- Hyper-specify requests from the LLM based on niche or collective goals.

NOTICES:

- Quality & Accurate Data Is Key.

- Great Ease Of Use.

- Max Testing Was Conducted With A 600 Page Count Document.

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USAGE NOTES PART 2

- Select an LLM model to be used.

- Connect a data provider via API.

- Each data set from data provider can be uploaded as a convenient file.

- Use the AI agents to extract and assess data for a specific goal / objective.

- Capitalize on this objective with rewards, notifications/prompts, fail-safes etc.

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PILOT USAGE MAPPING

PROMPTING NECESSITIES

- Accurate & Secure Data Management.

- Segmented Customer/ Client/Member Data Sets.

ACTIVATION PROCEDURE

- Activate LLMs based on specific objectives.

- Allow LLMs to tailor the personalized banking approach.

- Select one of the embedded LLM model.

- Ask strategic questions to the LLM based on specific inquiries regarding the document.

- LLM will responded 100% accurately will clear data.

PROSPECTIVE OBJECTIVES

- Expand on AI data with niche data prompts for more insights.

- Capitalize on this objective with scheduled/ automatic/manual rewards, notifications/ prompts, fail-safes etc

- Organizing internal 'data briefings' for better cohesion, data integrity and AI - human harmony.

- Repeat process to streamline hyper-personalization for daily client/member operations.

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VALUE PROPOSITIONS

1 STREAMLINED DATA ANALYTICS

2 EFFICIENCY

3 ACCURACY

4 TIME SAVINGS / LABOUR COSTS

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VALUE PROPOSITIONS

Great aid in fostering emotional connections with clients/members given that you can anticipate their needs and wants before their requests are made themselves by using their data (in a responsible way of course). Therefore each banking client/member will experience the boutique high net worth individual approach.

This subsequently garners customer loyalty because of the emotional connection the super-tailored experience AI provides - allowing banks a substantial edge over their competitors.

Given the quickness of this tool, the utility can not only save time but aids in eliminating human error given the accuracy rate of the tool.

That time and accuracy optimization will subsequently allow bankers more time for more human-centered, personalized tasks - contributing to overall client/member appeal and client/member retention efforts.

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QUICK FACTS

About The Founders

Ricardo McHardy and Sandeep Kumar are the co-founders of AI banking hyper-person-alization proof of concept.

Prior to this, they have designed, built and implemented other solutions within the enterprise software world and were part of multiple implementation teams for software innovation.

About The Technology

This AI has its registered office within the state of Delaware, USA (Silox Corporation).

The co-founders and team of this proof of concept all work remotely.

The demo version of the app is hosted on an AWS cloud server located in the US.

All production levels of the AI proof of concept will be implemented on the server chosen by your bank.

About Our Associates

Together with us we have our associates from Amarante LAC - registered in Mexico. They have a team based in Mexico that we are working with directly for this project.

We have been working with Amarante since 2020 where we built a synergy during our collaboration on a project for the Dominica Cooperatives Societies League Limited.

Amarante has many years of experience and substantial knowledge in delivering enter-prise software solutions to institutions around the world and it is a pleasure to have them along with us.

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