

EMBEDDED AGENT PILOT FOR FINANCIAL SERVICES

60 days. One workflow.
One operational KPI.



Your KPI. Your target.
We hit it or you don't pay.

A low-risk, outcome-based pilot to deliver measurable results on a real financial services problem—fast.

HOW THE PILOT WORKS



**Week 1: Map the workflow.
Baseline the KPI.**

Define success criteria with business owners and stakeholders.



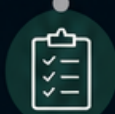
**Weeks 2–5: Build the agent
against your data.**

Integrate with core systems, data, documents, and workflows. Shadow-test in a controlled environment.



**Weeks 6–7: Live in production.
Human-in-the-loop.**

Deploy into real operations with oversight and measure impact in the workflow.



**Week 8: Signed report.
KPI delta vs. baseline.**

Deliver results report and clear recommendation for production rollout.



LOW-RISK ENGAGEMENT MODEL

- ✓ Focused on one operational KPI
- ✓ Fast time-to-value (60 days)
- ✓ Small footprint, big impact
- ✓ Built alongside your existing team
- ✓ Scale only after results are proven

\$75K–\$150K
FIXED-PRICE PILOT



Fixed fee. No time-and-materials surprises.



No change-order chaos.



Built on Azure, AI Foundry, and Microsoft Copilot.



Built on Azure
Enterprise-grade security, scalability, and reliability.



Powered by AI Foundry
Build, evaluate, and operate agents with enterprise controls.



Enhanced with Microsoft Copilot
Extend productivity and insights across your organization.



Secure. Compliant. Connected.
Integrates with your systems, data, and operational stack.

FINANCIAL SERVICES USE CASES WE CAN PILOT

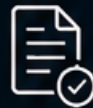
1



Fraud detection & transaction monitoring

Detect suspicious activity in real time using AI/ML on transactions, customer behavior, and network data to reduce fraud losses and false positives.

2



Credit risk assessment & underwriting automation

Accelerate credit decisions by analyzing financials, alternative data, and unstructured documents to improve risk accuracy and approval rates.

3



Customer 360 & relationship intelligence

Unify customer data across systems to surface insights, next-best actions, and cross-sell opportunities for RMAs and advisors.

4



Intelligent customer service & support

AI agents resolve customer inquiries, explain products, track requests, and automate routine interactions across chat, email, and voice.

5



Enterprise application extension for employees

Transform complex core banking, CRM, and risk systems into simple, natural-language, Copilot-enabled experiences for faster execution.

6



Regulatory compliance & reporting automation

Automate regulatory reporting (FR Y-14, CCAR, DFAST, IFRS 9), control testing, and policy monitoring to reduce manual effort and compliance risk.

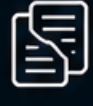
7



Finance & accounting automation

Automate reconciliations, close management, variance analysis, and journal entry support to accelerate close and improve accuracy.

8



Document & knowledge intelligence

Search and extract insights from contracts, policies, research, and internal documents to speed up decisions and retain institutional knowledge.



BOOK A TIME WITH OUR TEAM

Start with a 90-minute AI Innovation Workshop and we'll scope the pilot live.

BOOK NOW →

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