Augmenting Your Employees: Empowering Financial Organizations **with AI-Powered Search and GenAI Assistants**

Sinequa.
by ChapsVision

Introduction

Today's banking and finance markets are more diverse and interconnected than ever. U.S. investments continue trading overseas long after markets close in New York and Chicago. Stock index futures have increased the volatility of global stock markets, and currency fluctuations are influenced by global events and governmental actions. At the heart of this complex financial world lies data.

Financial organizations handle a massive volume of both structured and unstructured data, such as transactions, trade records, credit card histories, customer inquiries, and online interactions. In the U.S. alone, banks store over an estimated 1 exabyte of data. Financial analysts and knowledge workers must navigate this data-heavy environment, often encountering decision fatigue and a cognitive burden due to the sheer volume and ambiguity of information.

Many financial institutions are turning to automation and AI-powered technologies to manage the overwhelming influx of data and evolve from simply data-driven organizations to truly augmented ones. With the help of AI-Powered Search and GenAI assistants, leading financial companies are making informed decisions faster, improving customer service, and uncovering new opportunities for revenue growth.

Transform Financial Data into Actionable Insights

Augmenting employees with AI means turning vast data stores into actionable insights. Financial institutions need to process data intelligently and securely, aligning it with their business goals. For example, retail banks may use AI-powered search to enhance customer service and cross-sell products like home mortgages and car loans.

Insurance companies analyze demographic, behavioral, and meteorological data to assess risk and speed up claims processing. Credit card companies leverage AI to identify credit risks in real time, transforming operational data into proactive decision-making.

AI-Powered Search and GenAI Assistants Drive Innovation

The Sinequa platform uses AI-Powered Search and GenAI assistants to synthesize financial data from various formats and languages, transforming it into relevant, secure, and easily accessible information. From banking to insurance, leasing, property management, and asset management, Sinequa empowers critical business processes by providing insights aligned with organizational goals.

Sinequa's advanced AI platform enables financial institutions to create instant, 360-degree views of customers, portfolios, investment targets, contracts, and more. By connecting dispersed data sources and applications, the platform optimizes customer experiences and enhances operational efficiency.

With Sinequa's AI-Powered Search, financial organizations gain visibility across all business units, providing unified access to internal and external data such as customer contracts, insurance claims, payment histories, CRM data, and more. Employees no longer need to know where data is stored or how to access it; they can focus on delivering superior results.

One Solution for Multiple Financial Landscapes

Sinequa's AI-powered Search approach is versatile across various financial sectors:

Retail Banking

Crédit Agricole, one of the largest banks globally, has implemented a digital workplace that provides a 360° customer view. With Sinequa's platform, over 60,000 internal users can access relevant customer information, enhancing service and satisfaction. Customers can also manage their financial data in a seamless online experience.

Insurance Companies

Sinequa's AI-powered views enable the sharing of information across agencies and brokers, helping to assess risks and improve decision-making processes.
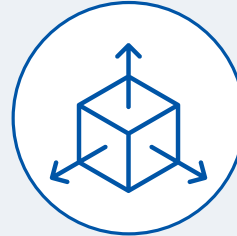
Fraud Detection

Financial fraud is constantly evolving. Sinequa's dynamic relationship mapping and machine learning capabilities connect financial data types, helping analysts detect fraud patterns and behaviors with the aid of interactive charts, timeline analyses, and relationship maps.
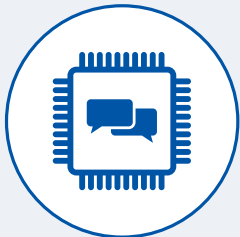
Key Features of Sinequa's AI-Powered Platform

Machine Learning
Automatically classify documents using advanced algorithms, enhancing data organization and access.

Scalability
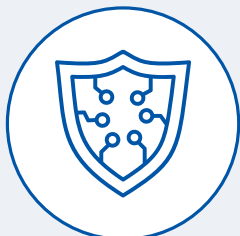Handle large volumes of structured and unstructured data while maintaining deep analytical capabilities.

Natural Language Processing
Support for over 20 languages ensures that global financial institutions can understand and process data effectively.

Relevance Feedback Model
AI algorithms adjust content relevance based on user queries, ensuring the most pertinent data surfaces in real-time.

Security
Robust security features support complex multi-layered enterprise environments.

User Experience
An intuitive, adaptable user interface ensures employees can easily navigate data insights, enhancing productivity and decision-making.

Trusted by Industry Leaders

Sinequa's AI-powered search technology is trusted by some of the world's largest financial organizations. Recognized by Gartner and Forrester, Sinequa continues to receive accolades for its role in empowering financial organizations with AI-driven insights that fuel innovation and success.

SOCIETE GENERALE   DZ BANK   usbank

NAVY FEDERAL Credit Union   CA

About Sinequa

Sinequa transforms work by providing employees with AI-powered Assistants that enhance productivity, accuracy, and security. These Assistants streamline workflows, simplifying access to enterprise information, so employees can focus on impactful tasks. Combining enterprise search with generative AI, Sinequa offers a secure, customizable, and efficient conversational experience. Learn more at www.sinequa.com.

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