Tiger Analytics™

# Enabling a Large Payment Services Firm to Offer Meaningful Gen AI-Driven Financial Advisory Services

INDUSTRY

Financial Services

CAPABILITY

Gen AI,
Conversational AI,
NLP,
Sentiment Analysis

FUNCTION

Customer Support and Financial Advisory

TECH STACK

Azure OpenAI

## Client Overview

The client is a leading mobile payment services provider based in Asia, offering digital transactions and financial management solutions to a rapidly expanding customer base. With growing user interactions and rising demand for instant financial insights, user engagement and agent responsiveness became their business-critical goals.

## The Ask

The client wanted an AI-powered solution to improve customer experiences and agent productivity. They were looking to enable quick, accurate query handling, deliver financial insights, and provide consistent knowledge-based recommendations across all interactions.

## Challenges

**Guardrail Integration Gaps:**

Lack of response controls made it difficult to manage competitor-related queries and maintain adherence to the approved knowledge base.

**Response Conciseness Issues:**

Challenges in maintaining brief, contextually accurate outputs affected user engagement.

**Custom Package Deployment Hurdles:**

Difficulty in implementing and integrating the Text Analytics Language API for sentiment analysis through Prompt Flow.

**Third-Party Integration Limitations:**

Limited connectivity with the existing contact center application created integration constraints.

## Our Solution: Gen AI-Powered Wealth Coach and Copilot

**Scope Identification & Prioritization:**

Designed for two user groups: end customers seeking investment advice and support agents using it as a copilot.

**Input Data:**

Data included historical contact-center interactions, SOPs, financial advisory content, company knowledge bases, best practices, and partner recommendations. Inputs were primarily PDFs and text files.

**Pre-Processing:**

PDFs were ingested using a pipeline with Form Recognizer for extraction and Azure AI Search for indexing and retrieval.

**Models Deployed:**

A sentiment model built on Azure ML evaluated customer feedback, while an intent recognition model using Azure OpenAI analyzed and classified user queries.

**LLM Tuning:**

Prompt tuning optimized LLM outputs for intent detection, responses, recommendations, and summarization. Prompt Flow orchestrated RAG and LLM nodes to retrieve documents and generate summaries within guardrails.

**System Interfaces:**

Two interfaces were deployed. The contact-center agent interface provided procedural knowledge, tracked intent and sentiment, identified similar tickets, and suggested sentiment-based responses. The end-customer interface delivered financial knowledge and advice by responding directly to user queries.

## Impact Delivered

Improved customer financial literacy and investment decisions through personalized Gen AI.

Reduced average agent query resolution time, enhancing contact center responsiveness.

Ensured scalability to support 100 concurrent users with an average latency of 7 seconds

Achieved 88% model accuracy across 6 parameters, with 100% compliance in ethics and behavior

## Deliver Smarter, Scalable Customer Engagement With GenAI

START A CONVERSATION

## About Us

Tiger Analytics is a global leader in AI and analytics, helping Fortune 1000 companies solve their toughest challenges. We offer full-stack AI and analytics services & solutions to help businesses achieve real outcomes and value at scale. We are on a mission to push the boundaries of what AI and analytics can do to help enterprises navigate uncertainty and move forward decisively. Our purpose is to provide certainty to shape a better tomorrow.

US | UK | Netherlands | Spain | Canada | Mexico | India | Singapore | Philippines | Malaysia | Australia