

How Conversational AI Enabled a Financial Services Firm to Achieve Low-Touch GTM Analytics

INDUSTRY

Banking and Financial Services

CAPABILITY

Multi-Agent Analytics

FUNCTION

Go-to-Market (GTM) Sales

TECH STACK

Python, SQL, Azure OpenAI (GPT-4.1, GPT-4.1 Mini, GPT-4.1 Nano), AWS Bedrock (Claude Sonnet 4.6), LangGraph, Microsoft Presidio, Azure SQL, Oracle FCCDW, Azure Redis, MLflow

Client Overview

Our client is the Financial and Corporate Compliance (FCC) division of a premier global provider of legal entity compliance, banking product compliance, and risk management solutions. Serving enterprise sales and compliance functions worldwide, they provide business-critical solutions that require precision, strict governance, and real-time decision support.

The Ask

The client needed to transform its fragmented Go-to-Market (GTM) data environment into a conversational, AI-driven insights engine. The goal was to enable sales reps and executives to interact directly with performance metrics via natural language, eliminating reliance on analyst cohorts and driving low-touch decision support.

Challenges



Systems depended on downstream outputs from complex ML models and high-volume enterprise databases, making raw data traversal slow and inefficient.



Strict organizational policies mandated the use of whitelisted services. Custom basic evaluation frameworks were added along with MLflow.



Managing baseline overrides in isolated repository branches required additional configuration steps during cloud deployment.

Our Solution: Multi-Agent Conversational GTM Analytics Layer

Built a 3-Layer Security & Access Control Framework: Engineered a Zero-Trust RBAC pipeline featuring an intent classification gate, secure user identity binding passed to the SQL agent, and row/column-level table filtration at the database layer.

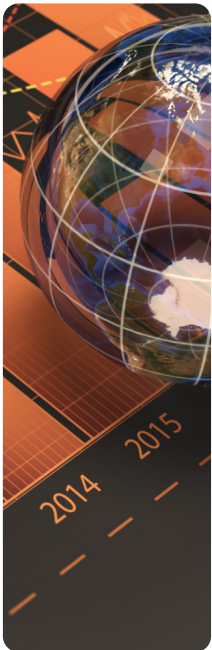
Developed Custom Connectors & Multi-Tier Data Sanitization: Constructed proprietary backend service connectors enforcing 100% structured field masking and up to 95% unstructured data masking across environments.

Designed a Centralized Semantic Pre-Aggregation Network: Structured a semantic layer mapping 18 core tables and ~200 pre-calculated KPIs across monthly, quarterly, and yearly intervals, reducing execution latency.

Implemented Multi-Agent Natural Language Querying: Deployed specialized SQL planner agents to translate natural language user questions into optimized, context-aware queries executed against upstream ML data outputs.

Tailored Front-End Insight Cards by Persona: Designed targeted interfaces for Sales Reps (quota attainment and next-best actions) and Sales Managers (aggregate pipeline health and leadership views).

Impact Delivered



Reused foundational Chat AI workflows to achieve ~60% code asset reusability, significantly reducing development and deployment lifecycles.

Standardized KPI definitions enterprise-wide, eliminating conflicting performance interpretations between leadership and reps.

Replaced manual data traversal with instantaneous, conversational query resolution for sales leadership, eradicating analyst bottlenecks.

Passed strict corporate risk assessments through zero-trust security compliance, including intent routing, multi-layer RBAC, and robust data sanitization.

Successfully completed User Acceptance Testing (UAT) with active business cohorts across reps and managers, validating persona adoption.

What Could Conversational Data Intelligence Unlock for Your Sales Strategy?

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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.

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