



05-Sep-2024

USA

Searching For AI - Bankers Bakeoff Case Studies

Golden Nugget - LIVE!!!

How Super.com Achieved Rapid Loan Origination with AI and Oscilar



North America

AI Category Name

Lending Underwriting

AI Feature

Loan Processing & Underwriting

AI Technology

GenAI

Machine Learning (ML) Algorithms

Super.com deploys AI solution for lending. Super.com is dedicated to providing ultimate savings to its customers, enabling them to enjoy life's offerings irrespective of their income. With a team of over 1,000 employees, Super.com has established itself as a key player in the financial services industry. The Challenge: Super.com needed a loan origination system to launch their lending service, facing challenges with manual processes and the need for extensive engineering resources. The Outcome: Oscilar, an AI-driven solution for loan origination and management. The company provided a user-friendly, low to no-code platform that streamlined decision-making workflows and integrated various data sources, significantly reducing manual labor and engineering hours. Biggest benefits; rapid deployment and enhanced decision-making for Super.com

Searching For AI Commentary

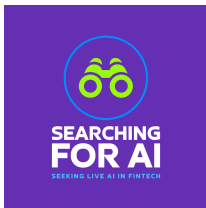
Interesting dual use of AI, the underlying tech from Oscilar can do more than one thing. Build the system AND make it easier to run.

Start Internet Research - Original Story Link

<https://oscilar.com/case-study/super>

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Malta

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Europe

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FIMBank Augments Their SOC with SentinelOne's Vigilance MDR

AI Category Name

Security

AI Feature

Security

AI Technology

GenAI

Machine Learning (ML) Algorithms

FIMBank chose SentinelOne's platform for its advanced, next-generation endpoint protection platform (EPP) and endpoint detection and response (EDR) capabilities. The only security solution providing full network visibility directly from the endpoint, SentinelOne delivers autonomous endpoint protection through a single, light-weight agent that successfully detects, blocks, and responds to all malicious threats.

"Sixty to seventy percent of threats start from an endpoint," says Stefan Galea, First VP and Head of IT Infrastructure & Information Security at FIMBank.

Searching For AI Commentary

Security and AI are like bread and butter, meant to go together. I like this FIMBank application of AI and the company behind the scenes, SentinelOne is making waves in AI.

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<https://assets.sentinelone.com/casestudy/sentinel-one-fim-ban>

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North America

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VyStar Credit Union Boost Member Experience w/ AI Solution from Verint CX Automation Co.

AI Category Name

Customer Service Agent Features

AI Feature

Customer Service - Incident Analysis

AI Technology

GenAI

Large Language Models

Machine Learning (ML) Algorithms

VyStar is the 13th-largest credit union in the country and serves more than 925,000 members including 50,000 small business members, with over \$13.5 billion in assets. VyStar used its need to comply with a whole new set of regulations, including additional rules for safeguarding member accounts and identities, as a catalyst for operational and CX improvement. With its exponential growth, its devotion to its members and drive to deliver a best in call member experience grew as well. Focal to its operational efficiency and member experience improvement efforts, VyStar developed scorecards to consolidate vital member data and insights from Verint Speech Analytics. Powered by Verint Da Vinci AI and offering outstanding transcription and comprehension accuracy, Verint Speech Analytics transcribes 100 percent of recorded calls to automatically discover and analyze words, phrases, categories, and themes to reveal insights for operational and CX improvement.

Searching For AI Commentary

VyStar has always been out front and now is leading again in the CU space with their clever use of AI.

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<https://www.verint.com/case-studies/best-of-breed-verint-cx-automation-helps-vystar-credit-union-boost-member-experience/>

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Australia

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Suncorp Australia Improves Engagement with Conversational AI and Cool Bots



Indo Pacific

AI Category Name

Conversational Banking (Bots)

AI Feature

Chatbot - Customer Service

AI Technology

Large Language Models

Machine Learning (ML) Algorithms

GenAI

Suncorp is a leading finance, insurance, and banking corporation based in Australia. The company operates a network of financial brands throughout Australia and New Zealand, including AAMI and GIO. With consumers already preconditioned by existing digital experiences, the financial services leader wanted to add conversational user interfaces at the forefront of its websites to address customer enquiries and elevate experiences. Ideally, it wanted to find a single intelligent virtual assistant (IVA) platform that could support multiple conversational interfaces representing each of its brands, and each tailored with specific brand personas. With these goals in mind, Suncorp began exploring scalable IVA solutions that would help it increase digital adoption, maximize productivity in the call centre, and provide quick, accurate answers to customer questions online.

After extensive due diligence, Suncorp partnered with Verint, who not only offered innovative IVA technology but brought years of customer engagement experience with it. In selecting Verint Intelligent Virtual Assistant, Suncorp gained a robust, open, and modular conversational AI platform that could support multiple IVAs for its brands leveraging a single conversational AI platform,

Searching For AI Commentary

That's a big deal, a Platform chatbot. When you buy a convo banking feature for one part of the business, make sure to be able to apply it to all parts of the business ie a chat platform. Suncorp is a leader right now in the AI space.

Start Internet Research - Original Story Link

<https://www.verint.com/case-studies/suncorp/>

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Netherlands

Europe

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ABN AMRO Transforms KYC Process with an Award-Winning Implementation of Next-Gen Technology

AI Category Name

Compliance

AI Feature

Compliance - General

AI Technology

GenAI

Machine Learning (ML) Algorithms

With its implementation of Quantexa's Decision Intelligence Platform, Dutch bank ABN AMRO can now generate holistic views of its corporate customers using higher-quality data – and focus its KYC resources on investigating real financial crimes. Like many financial institutions, ABN AMRO Bank N.V., one of the largest Dutch banks, wanted to modernize its KYC program and make its KYC investigation process more intelligent, efficient, and effective. To achieve that goal, it sought a next-generation technology solution – and found what it was looking for in Quantexa's Decision Intelligence (DI) Platform. “Quantexa's DI platform has allowed our investigative teams to greatly reduce time spent on gathering data, understanding that data, and trying to differentiate between legitimate and potentially suspicious activity” says Paul Weststrate Product Owner, ABN AMRO

Searching For AI Commentary

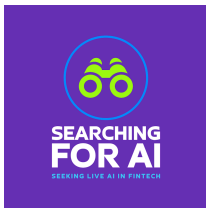
ABN doing good with AI in compliance and seeking out, not AI but false positives :-)

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<https://www.quantexa.com/resources/abn-amro/>

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USA

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Synovus uses AI to Reframe Personalized Engagement



North America

AI Category Name

Personalized Engagement

AI Feature

Personalized Engagement

AI Technology

Machine Learning (ML)
Algorithms

GenAI

Synovus, the 8th largest bank headquartered in the Southeast U.S., partnered with Personetics to personalize its digital experience and deliver data-driven financial insights to its 300,000 consumer digital banking clients. Synovus, sought a radical transformation of its digital channels, moving beyond transaction utilities to create true engagement platforms with deeper customer personalization.

Synovus envisioned a unified, persistent engagement experience across all touchpoints. This platform would offer customers timely, personalized insights and tailored advice precisely based on their specific financial needs and life circumstances. Clients engaging with the insights since launch grew their average relationship balances at a higher rate, demonstrated stronger cross-sell performance, and rated Synovus higher than pre-launch in areas such as delivering quick tips and tools to improving their financial well-being.

Searching For AI Commentary

Hyper-personalization driven by AI. That is the future right there in a hand-basket... Synovus has done some really cool stuff to heighten the customer experience.

Start Internet Research - Original Story Link

<https://personetics.com/resource-center/reframing-personalized-engagement-synovus-partnership-with-personetics/>

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Turkey

Europe

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Akbank AI to Boost Customer Engagement and Sustainable Revenue Growth w/ Personetics

AI Category Name

Personalized Engagement

AI Feature

Personalized Engagement

AI Technology

GenAI

Machine Learning (ML) Algorithms

Large Language Models

Akbank is one of the leading Turkish banks known for its innovative use of technology and customer-oriented service model. The bank's digital innovation team decided to redesign its mobile application to act as a trusted financial advisor to increase customer engagement and revenue growth. Partnering with Personetics, Akbank was able to offer its customers hyper-personalized insights into their spending patterns and present saving opportunities utilizing an analysis of the customer's financial data. This AI-driven personalized solution not only increased the customer engagement rate and boosted satisfaction, but also reinforced Akbank's position as the most technology-savvy bank in Turkey.

Searching For AI Commentary

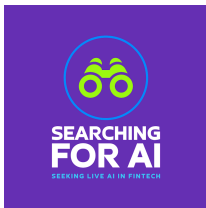
Great case study of a bank getting in to the advice business AND using AI to do it. Insights and advice hit banking... Love it. Thank you Personetics.

Start Internet Research - Original Story Link

<https://personetics.com/resource-center/akbank-partners-with-personetics-to-boost-customer-engagement-and-sustainable-revenue-growth/>

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UK

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'Straight2Bank' Digital Assistant: Next-Gen Digital Solution for Corporate Banking Customers



Europe

AI Category Name

Conversational Banking (Bots)

AI Feature

Chatbot - Corporate Banking

AI Technology

Large Language Models

Machine Learning (ML) Algorithms

GenAI

Standard Chartered partnered with Gupshup to launch 'Straight2Bank' Digital Assistant on its net banking platform for its corporate banking customers globally with support for 4+ languages (including English, Chinese and Bahasa). The digital assistant is designed to offer a seamless and user-friendly experience to customers, allowing them real-time assistance with banking queries. The digital assistant's advanced capabilities enable it to understand natural language commands, thereby facilitating conversational interactions with customers. This feature has been instrumental in enhancing the customer experience by enabling faster query resolution via FAQs, with multi-level fallback options for routine queries. The launch of the 'Straight2Bank' Digital Assistant has been a success for Standard Chartered Bank. The deployment of a variety of banking use cases in over 4 global languages resulted in widespread adoption among its corporate banking customers in global markets.

Searching For AI Commentary

Corporate banking, like to see the attention there as it always gets the cool tech late, or never :-). Gupshup is an interesting company to watch.

Start Internet Research - Original Story Link

<https://www.gupshup.io/resources/case-studies/standard-chartered-leverages-ai-powered-conversational-support>

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UK

Europe

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Lloyds Bank partners with Cleareye.ai to provide cutting-edge trade finance tech solutions

AI Category Name

Trade Finance Monitoring/Compliance

AI Feature

Compliance - General

AI Technology

GenAI

Large Language Models

Machine Learning (ML) Algorithms

In a UK first, Lloyds Bank has partnered with Cleareye.ai, a specialist artificial intelligence platform, using AI to streamline the processing and compliance checking of trade finance documentation to drive efficiencies for clients. Cleareye.ai's ClearTrade technology will be implemented from this month. The advanced technology will use optical character recognition (OCR)*, machine learning, and natural language processing algorithms to extract critical information from trade documentation. This includes digital and paper-based import and export documentary letters of credit, documentary collections, undertakings and trade loans.

Searching For AI Commentary

Cool new use of AI for trade finance and the associated enrollment and compliance. Pretty cool stuff.

Start Internet Research - Original Story Link

<https://www.lloydsbankinggroup.com/media/press-releases/2024/lloyds-bank-2024/lloyds-bank-partners-with-cleareye-dot-ai.html>

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Turkey - NO
CUSTOMER



USA

North America

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WaveCX Brings AI-Driven Generative Search Capabilities to Community Financial Institutions Through New Curator Tool

AI Category Name

General Customer Service

AI Feature

Employee General Automation

AI Technology

GenAI

Large Language Models

Machine Learning (ML) Algorithms

WaveCX, provider of personalized, digital product engagement solutions for financial institutions, today announced the launch of Curator, an AI-driven generative search tool designed to bring clarity to complex banking documentation. Going beyond basic search functionality, Curator was created to meet the growing demand for a robust search solution capable of navigating extensive content libraries while powering an educational experience for financial institutions' customers and employees. "Curator isn't just about search – it's about making your communication and documentation operations smoother and more successful," said Jon Tvrdik, CEO and founder. "We called it Curator because it puts you in the driver's seat. You decide which sources – from WaveCX demos to internal documentation and marketing sites – are most important. Curator merges it all together and bubbles the correct and relevant bits to the top. It's about empowering your team with pertinent info faster and helping your customers find the answers they need."

Searching For AI Commentary

Turkey, where are the customers??? Looks like an interesting tool and this shows how without a case study it is a bit harder to figure out what they really do...

Start Internet Research - Original Story Link

<https://www.businesswire.com/news/home/20240904103185/en>

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Investment



USA

North America

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Palm Raises Funds - Founders Want to Make Moving Cash Easier for Big Companies

AI Category Name

Business Payments

AI Feature

Treasury Management

AI Technology

GenAI

Large Language Models

Machine Learning (ML) Algorithms

Palm raises a round - \$6.1 million. These founders knew treasury management and knew there were opportunities. It's no wonder, then, that the two decided to come together as co-CEOs, pairing their financial backgrounds to create a company that, in hindsight, would have made Pannu's former day job much easier. "With Treasury teams deciding how the largest corporations move cash around the world, it became obvious that guiding those money flows was worthy of bringing the best talent to rethink how it's done," Sobkowski told TechCrunch.

Searching For AI Commentary

Treasury Management is a cool area for AI as complexity abounds. Should be interesting to watch and we await customer tales...

Start Internet Research - Original Story Link

https://techcrunch.com/2024/09/03/from-their-experiences-at-uber-and-paypal-palm-founders-want-to-make-moving-cash-easier-for-big-companies/?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cudXNlcGFsbS5jb20v&guce_referrer_sig=AQAAADfwExhao8yQMVOh_BGBHKjmkRP2GkltQhbNqckCXfXiOIK0eWGN0z0cMcvSbVkJaYI4vahLC-cn5blCc81

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