Financial insights assistant
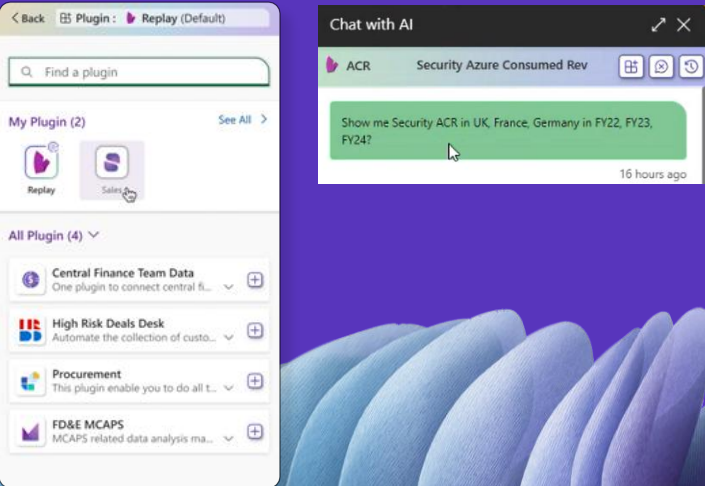
Microsoft

Solution Overview

The plugin-based approach cuts costs and boosts throughput

Elevates productivity by seamlessly integrating task completion with Q&A,
all within a centralized ecosystem

Offers insights from complex data through an intuitive user interface, making complex analyses straightforward

Connects effortlessly to any data type, unlocking new levels of analytical depth

Not just data analysis but intelligent, actionable insights delivered through calculations and visualizations

Business Use Case

The use of disparate finance systems complicates maintaining security and compliance, posing significant risks. The absence of a centralized ecosystem for AI copilot access results in missed opportunities for synergy and efficiency. Building similar AI patterns, such as document analyzers and databases, across multiple organizations, is
a duplicative effort that wastes valuable resources.

☑ Benefits

• Streamlines content and data navigation, enhancing productivity across tools and repositories

• Designed for seamless scalability, effortlessly extending benefits to additional finance organizations

• Automates the synthesis of internal and external data, enabling advanced exploratory analysis with minimal effort

• Employs adaptable AI modules tailored to specific business needs, ensuring a perfect fit for diverse use cases

Key Results

250k+ hours

annual time-reduction

Technology

• Azure AI Search
• Azure Open AI Service
• Azure Semantic Kernel
• Azure SignalR
• Azure Data Storage

Time taken

Launched in 6 months
(duration from concept to initial launch)