

# Leading FinTech Leverages AI to **Achieve 75 Percent Time Savings**

## Case Study



## Overview

### Need for greater speed and accuracy

An American multinational fintech corporation, which facilitates the movement of about \$9 trillion annually, processes close to 75 billion transactions by offering banking and capital market solutions to over 20,000 clients around the globe.

Given the scale of its operations, it decided to leverage emerging technologies to scale business operations effortlessly. The company consulted with Zensar to deploy an AI-enabled solution for creating SoW documents — one that would elevate speed and accuracy.

#### **Zensar's brief:**

- Deliver a solution that automates generation of SoW documents using a standard template.
- Enable efficient data extraction from different input source documents shared by customers, ensuring quality and accuracy.

## Beyond the brief:

Guided by our commitment to “experience-led everything,” we ensured that our focus was not just on technology, but more importantly, on the people who use it.



## Challenges

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### Hurdles to business efficiency

The client’s Professional Services (PS) teams were weighed down by these issues and complexities:

- **Errors and delays:** Traditional SOW creation involves manual extraction and insertion of data, prone to human errors and time-consuming processes.
- **Complex data integration:** Incorporating data from various formats into a single document was often challenging.
- **Difference in customers:** Ensuring uniformity and compliance with customer requirements is critical. But with each product and customer having different input source documents, this was a difficult task.
- **Lack of scalability:** Manual SOW generation isn’t scalable. With numerous products and customers, an automated system is essential to efficiently manage increasing document volumes without additional manpower.



## Solution

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### Application for first-session churn prediction

With the goal of empowering the client’s PS team with hyper-efficiency, we developed and deployed an AI platform that automates the generation of SoW documents by extracting relevant information from various input source documents, such as Excel and docx.

**Planning and design:** Our discovery process allowed us to gain granular insights into the process of creating SoW documents. With this understanding, we carried out these key actions:

- Create an SoW template with some static content and placeholders for dynamic content.

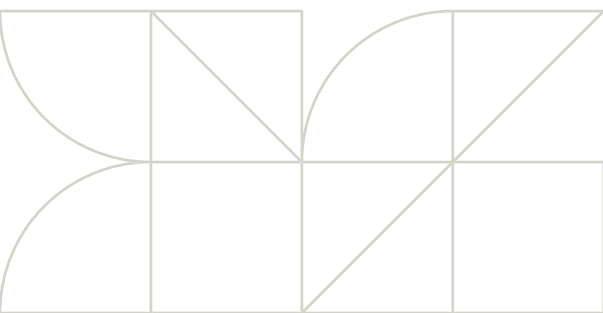
- Extract the right content from input source documents by utilizing prompt engineering.
- Fill the placeholders for the dynamic content with the extracted data and any additional information as per customer instructions defined in source documents.
- Ensure quality and accuracy by testing the generated documents and fine-tuning prompts.

**Enablement:** Drawing on our Azure competencies, we put together a powerful mix of services to deliver the solution:

- Azure infrastructure was used for its scalability, robust security, and seamless integration with AI and data analytics services.
- Azure containers was used for their scalability, efficient resource utilization, and seamless integration with Azure's cloud services.
- Azure OpenAI GPT-4o was used for its multimodal capabilities, real-time responsiveness, and advanced data analysis — all seamlessly integrated with Azure's robust infrastructure.
- Azure Bitbucket was used for its seamless integration with CI/CD pipelines, efficient repository management, and robust automation capabilities.
- Redis was used for its high-performance in-memory data storage, as well as its versatile use as a database, cache, and message broker.

**Implementation:** Leveraging AI capabilities, we deployed the solution with these key features:

- **Automation:** With automated data handling, we helped eliminate manual data extraction and insertion, reducing errors and saving time.
- **Consistency:** We standardized SOW generation, ensuring uniformity across different products and customers.
- **Data integration:** We enabled data from various formats to be seamlessly integrated into a single document.
- **Scalability:** The cloud-enabled solution was designed to efficiently manage increasing volumes of documents and customers without additional manpower.
- **Quality assurance:** With thorough testing and prompt refinement, we helped ensure high quality and accuracy.





# Impact

## Easily scalable operations

- 75 percent time savings
- Error-free documentation
- Standardized SOW generation

**Business outcomes:** The solution enabled the PS teams to produce an error-free SOW document in roughly 45 minutes; this task previously took up to three hours. The business is confident that the speed and accuracy of the solution would energize business growth.



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Part of the \$4.8 billion RPG Group, we are headquartered in Pune, India. Our 10,000+ employees work across 30+ locations worldwide, including Milpitas, Seattle, Princeton, Cape Town, London, Zurich, Singapore, and Mexico City.

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