



SMARTER BANKING WITH AI-POWERED CUSTOMER ASSISTANCE

THE APPROACH

Instead of simply deploying a chatbot, AE Partners designed an AI-powered customer assistance platform built to operate at enterprise scale.

After a deep assessment of the bank's customer support workflows, data infrastructure, and compliance requirements, the team created a roadmap to transform how customer inquiries were handled.

The solution combined advanced AI, live financial data access, and intelligent automation to deliver accurate responses in real time.

Key capabilities included:

- Generative AI-powered natural language assistance using GPT-4 for human-like conversations and precise responses
- Real-time integration with CRM and trading systems, providing access to over 50 million records
- AI search capabilities to surface investment insights and assist with account-related processes
- Built-in compliance guardrails to ensure responses aligned with financial regulations
- Smart escalation workflows that seamlessly route complex cases to human agents
- High-availability infrastructure capable of handling thousands of daily interactions without performance loss

The platform was engineered to manage 10,000 daily conversations, with up to 500 concurrent users, while maintaining high response accuracy across both standard and complex financial inquiries.

THE CHALLENGE

A major U.S. bank needed to handle growing volumes of customer inquiries about investments, accounts, and financial products while maintaining fast, accurate, and compliant responses. Traditional support channels created delays and overwhelmed service teams.



THE SOLUTION

AE Partners implemented an AI-powered customer assistance platform using GPT-4, integrated with the bank's CRM and trading systems to access over 50 million records in real time.

The platform included:

- AI-driven natural language responses
- Real-time financial data access
- Built-in compliance guardrails
- Intelligent escalation to human agents
- High-availability infrastructure supporting 10,000 daily interactions and 500 concurrent users

THE RESULTS

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