AI Squared for Customer-Centric Financial Services

Accelerate your AI journey

Scan here to learn more.

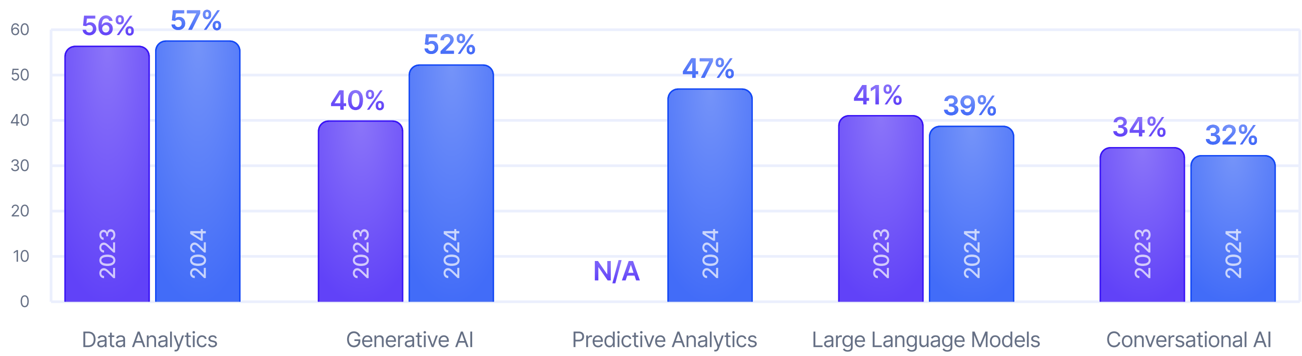
Executive Summary

Financial services firms today are at a pivotal crossroads, facing increasing pressure to deliver faster, smarter, and more personalized experiences to customers while maintaining compliance and operational efficiency. Generative AI, predictive analytics, and machine learning offer enormous promise, yet the ability to translate those capabilities into real business impact remains elusive for many. The core challenge lies in what's known as the "Last Mile Problem"—the difficulty of integrating AI and data insights into everyday workflows where decisions are made.

AI Squared directly addresses this gap. Our low-code platform empowers financial institutions to operationalize AI by embedding real-time, contextual insights directly into the applications business users rely on daily. This enables enterprises to drive faster decisions, reduce risk, and deliver elevated customer experiences while ensuring data integrity, governance, and continuous improvement.

What's happening in the Industry?

- AI adoption in financial services is at an inflection point, driven by growing demands for real-time analytics, personalized customer experiences, and robust compliance frameworks.
- According to Citi's GPS report, the global banking sector is projected to experience a profit increase of approximately 9% or $170 billion by 2028 due to AI implementation, highlighting the significant return on investment (ROI) potential.
- NVIDIA's report underscores this trend, with over 52% of financial institutions indicating ongoing generative AI projects, emphasizing the rapid maturity and strategic importance of AI investments in financial services.



Source: NVIDIA's State of AI in Financial Services: 2025 Trends

Opportunities Enabled by AI

Enhanced Customer Experiences

- AI-driven personalization allows institutions to deliver customized services, significantly improving client engagement and retention.
- NVIDIA identifies customer experience and engagement as the leading generative AI use cases, with 60% of financial services firms actively adopting these capabilities.

Operational Excellence

- Automation enabled by AI improves efficiency in risk assessment, credit underwriting, fraud detection, and transaction processing, reducing costs and enhancing productivity.
- AI significantly reduces manual processes, as indicated by NVIDIA's findings, where 32% of firms report enhanced operational efficiency through AI deployment.

Opportunities Enabled by AI

Advanced Risk Management

- Predictive analytics and AI-driven insights significantly strengthen fraud detection, regulatory compliance, and risk management strategies.
- AI's role in advanced transaction monitoring, compliance, and conduct management, essential for mitigating emerging cyber threats.

Impact of AI on Business Operations

37%
Created operational efficiencies

32%
Created competitive advantage

26%
Improved customer experience

22%
Yielded more accurate models

22%
Improved employee productivity

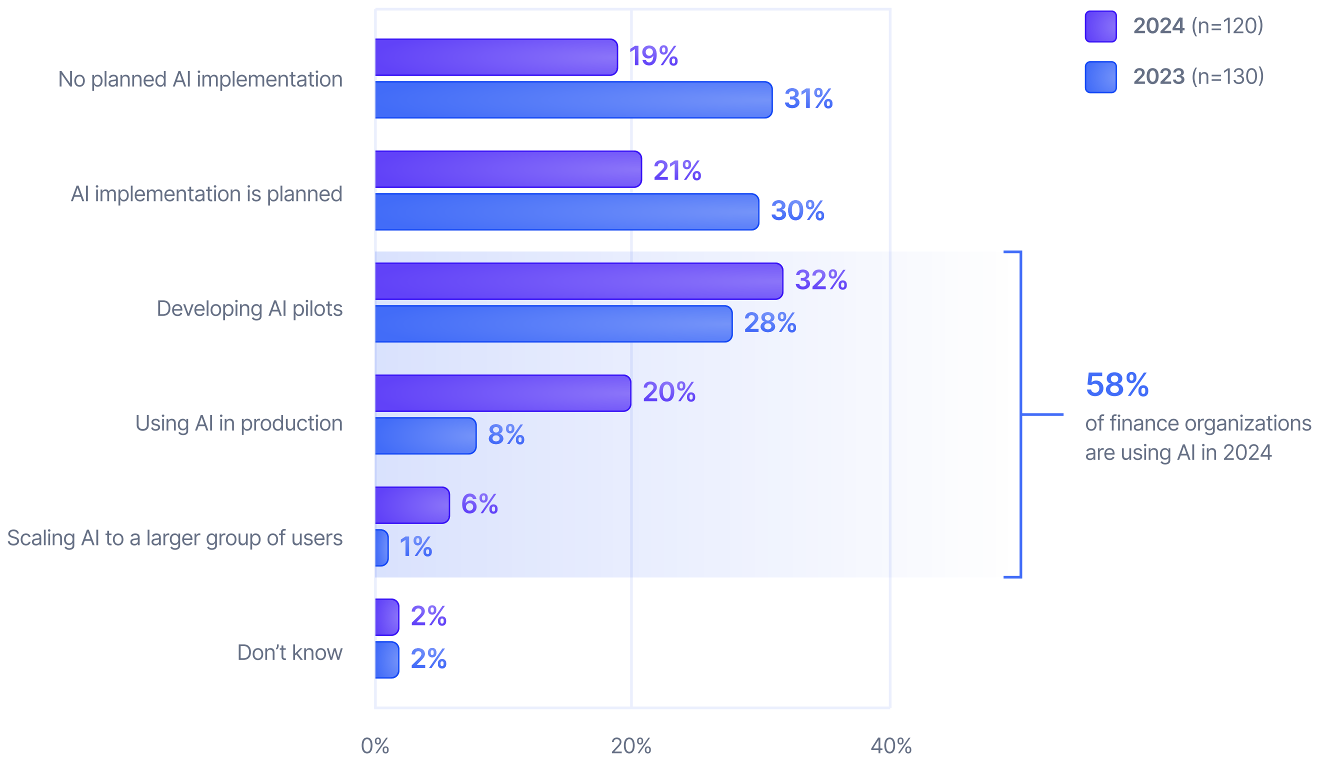
21%
Opened new business opportunities

Source: NVIDIA's State of AI in Financial Services: 2025 Trends

> **"The other 75% remain stuck in siloed pilots and proofs of concept, risking irrelevance as digital-first competitors accelerate ahead."**

Despite this immense potential, financial services organizations face significant hurdles in realizing the full value of their AI investments. Data science and AI teams often build sophisticated models but struggle to get them "off the shelf" and into the hands of the business users who need them most.

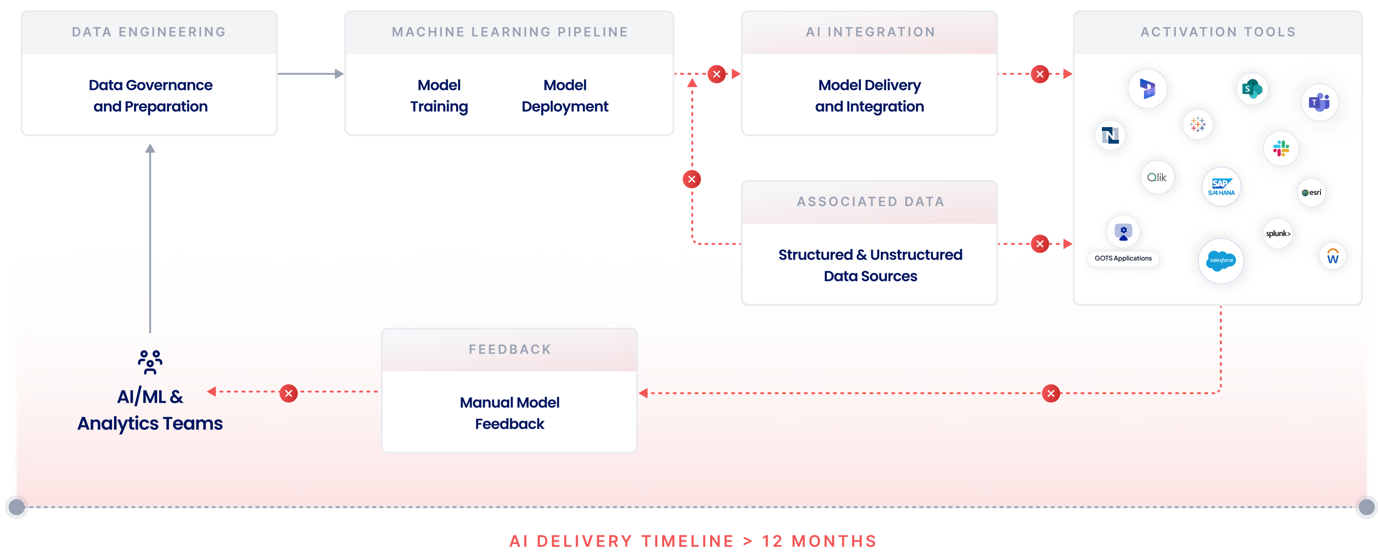
This challenge is often referred to as the "Last Mile Problem in AI". Productionizing data insights and AI models and embedding results into end-user applications is a complex process involving multiple teams and hand-offs, leading to delays. Traditional approaches to integrating AI models into business workflows can require hundreds of hours of work for each initiative, involving building extensive data pipelines, complex integrations, and developing the right user experience. This significantly delays the time-to-value for AI initiatives.



Source: 2024 and 2023 Gartner AI in Finance Survey

Furthermore, many organizations lack effective means to evaluate model effectiveness in real-world scenarios or gather feedback from end-users, hindering the crucial iterative process needed for continuous improvement.

This results in slow AI adoption rates and difficulty in demonstrating tangible ROI.



Core Challenges Faced by Financial Institutions

Complex Integration

Existing infrastructures significantly delay AI integration, often requiring extensive development resources and prolonged timelines.

Limited Accessibility

Many AI insights remain isolated from end-users' workflows, diminishing real-time decision-making capabilities and reducing overall utility.

Feedback Gaps

Insufficient feedback loops limit model adaptability, making it challenging to enhance AI performance post-deployment.

AI Squared: Bridging the Last Mile for FinServ

AI Squared is a unified, low-code platform built to integrate insights from data and AI models into any business application. Our mission is to help companies accelerate the process of delivering AI to business users. We address the "Last Mile Problem" by enabling organizations to rapidly embed AI in their mission workflows and deliver AI-powered decisions directly to where work happens.

The AI Squared platform achieves this through 3 key capabilities:

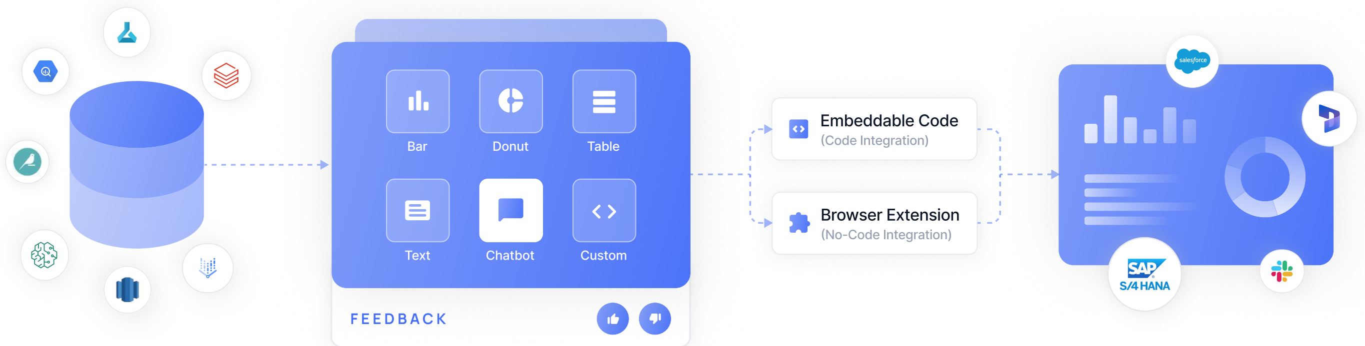
- **Data Activation**: Moving data from data warehouses (like Databricks, Snowflake, or AWS) to application-specific databases. We automatically sync data from central warehouses to any mission applications. This is facilitated by robust and modular data pipelines that transform data and sync source and destination databases.
- **AI Integration**: Integrating outputs from AI/ML models directly into web-based applications. We enable organizations to quickly embed AI in their mission workflows. Our platform allows you to bring your own model (BYOM) or integrate any LLMs (Open AI, Anthropic, Llama) into your workflows.
- **Feedback Loops**: Creating feedback loops between data teams and their stakeholders. We enable continuous improvement through feedback loops between AI consumers and AI developers. This involves capturing user feedback using formats like Thumb Up/Down, Star Ratings, and more. Analysing user feedback gives you visibility into user engagement, adoption rates, frequency of access and behaviour trends.

This simplifies the integration of data and AI, rapidly delivering data insights and models into web-based business applications at scale.

Delivering Actionable Insights at the Point of Decision

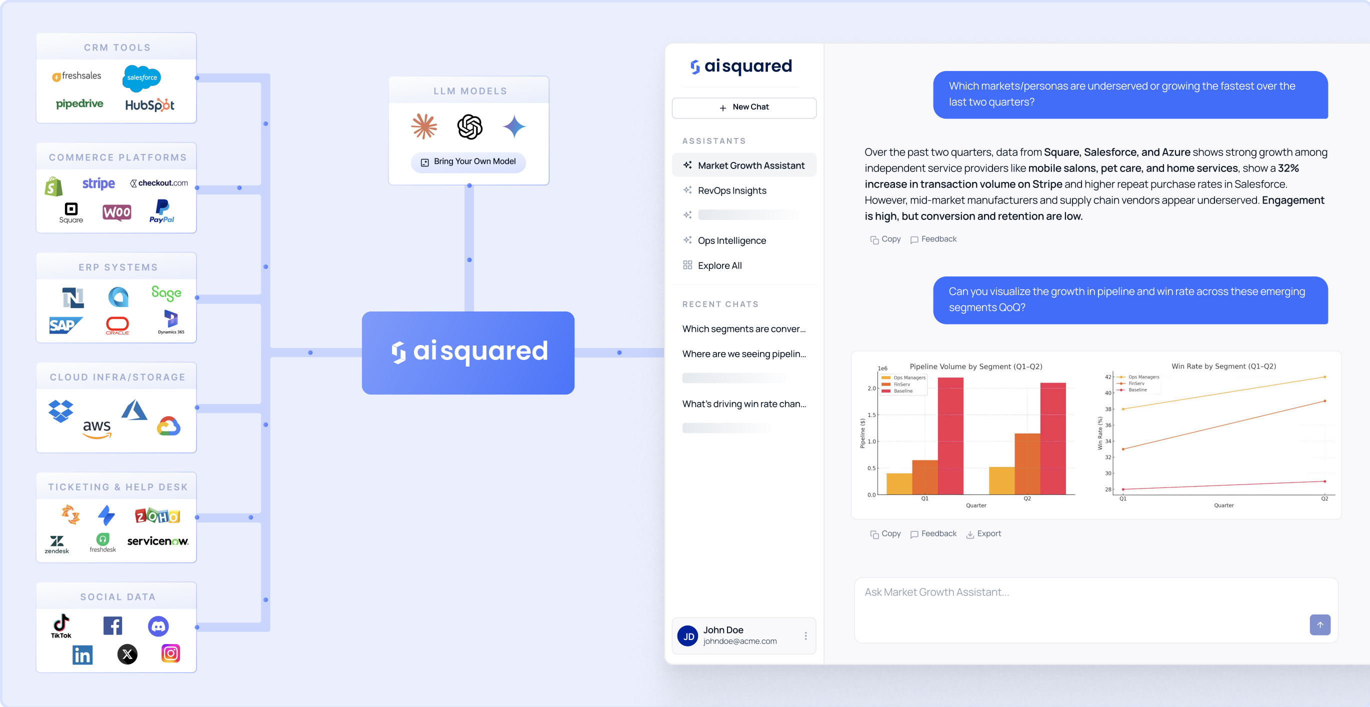
AI Squared enables organizations to make AI accessible and actionable within their everyday business applications quickly. We deliver actionable insights by embedding them directly into business applications, right when and where they're needed by business users. This means providing timely and actionable insights within the workflow to drive the user to complete necessary actions better and faster.

This is facilitated through AI Squared Data Apps. These are embeddable "data apps" (visualizations, chat-bots, custom renderings) that can be integrated within any business applications. Data Apps allow teams to transform any AI/ML model results into powerful insights visualizations using a no-code builder. They support various visualization types, including donut charts, bar charts, tables, text, and custom components. Users can integrate insights into business apps with no-code (via browser extension) or embeddable code.



The platform leverages business context by capturing key information from tools like CRMs, ERPs, and other business applications. It can harvest user context from business applications (via DOM elements or queries) for real-time inference. This ensures AI models respond to the right context and deliver the right insights, presenting predictions in easily digestible visualizations at the point of decision-making.

For generative AI use cases, AI Squared supports Retrieval-Augmented Generation (RAG) to provide contextual data to any LLMs in secured way and deliver relevant insights to users. This enables the team to get access to actional insights through natural language query, immediately.



Accelerating Time-to-Market and Enabling Rapid Iteration

A key value proposition of AI Squared is the ability to accelerate the time it takes to get AI into the hands of business users within their workflows. We offer a proven 5X faster speed-to-market for each new AI initiative. What typically takes data & AI teams 6-9 months from evaluation to integration can be achieved in under one month with AI Squared. This dramatically reduces engineering time for post-processing, data pipelines, integration, and gathering the right context. As highlighted by a Chief Analytics Officer at a Fortune 100 P&C Insurer, "To put it on the table candidly - this is valuable. And it solves major issues that our business partners face. There is a desire to consume faster. The desire also to make the feedback & iterative process faster. Just a way to simply collect feedback even".

AI Squared facilitates rapid prototyping and experimentation. The built-in feedback collection capabilities within Data Apps allow testing with select users, helping measure model effectiveness and inform AI project prioritization. You can capture end-user feedback right when they are engaging with AI insights as part of their business workflows. This continuous feedback mechanism is crucial for teams to take an informed decisions on model performance improvement and ensuring they meet business needs.

Enterprise-Grade Security and Governance

Organizations handle copious amounts of sensitive data requiring stringent protection, from personal information to social security numbers. AI Squared ensures security and compliance with privacy regulations. We offer **Enterprise-grade Data & Model Governance**. The platform can be deployed on your infrastructure, including completely self-hosted or private VPC deployments. We implement strict access controls and permissions to safeguard sensitive data. AI Automation contributes to governance by ensuring data consistency and reliability. The platform includes IAM integrations, Role-based Access control, and Workspaces for data control and governance. Models are ready for production when shared and are only shared with authorized groups or individuals.

CASE STUDY

How a leading fortune 100 Insurer achieved 5X faster speed-to-market for AI initiatives?

The Analytics & AI department, at the Fortune 100 insurer, is responsible for running all AI initiatives, including building models and delivering business improvement. These AI initiatives are both business-facing (models for use by their teams of underwriters, sales executives, and agencies) and consumer-facing. Achieving a faster speed to market is essential to enhancing their effectiveness and responsiveness. By improving speed to market, the organization can better respond to market demands.

Challenges

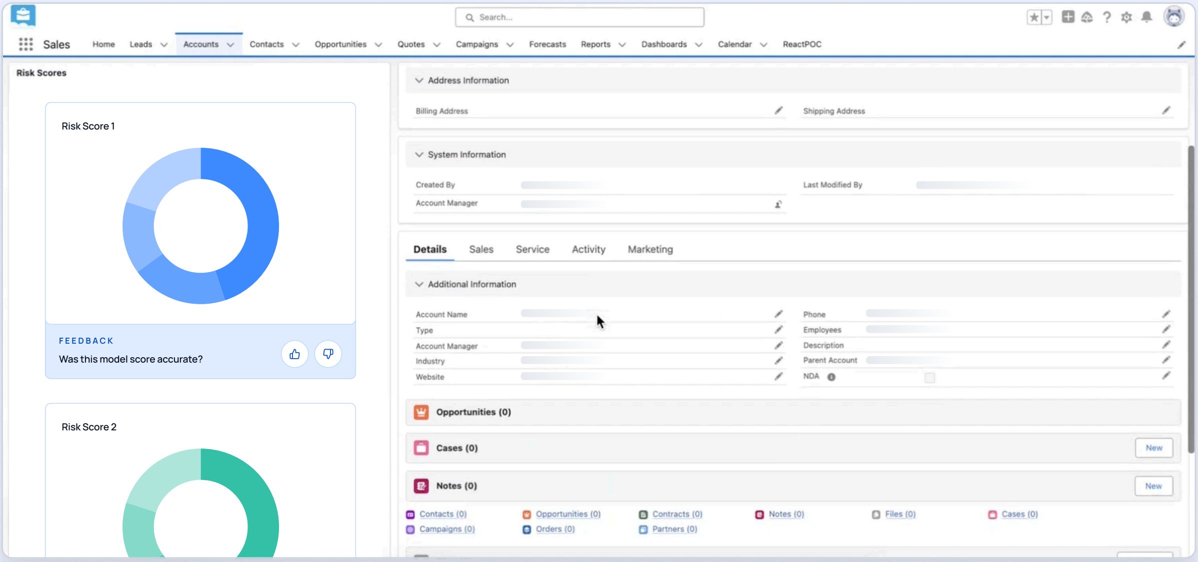
- **Integration Complexity**: AI implementation required hundreds of hours to build data pipelines and integrate with existing systems
- **Limited End-User Feedback**: Models were tested in isolation, limiting real-world performance assessment and iteration
- **Prioritization Issues**: Team struggled to effectively prioritize AI projects and implement them into daily workflows

Solution

- AI Squared enabled quick model deployment through pre-built connectors and no-code data processing, significantly reducing integration time with Salesforce CRM
- The solution embedded AI insights directly into users' existing CRM workflows, presenting predictions in the form of dynamic visualizations at the point of decision-making.

Solution

- Built-in feedback collection capabilities allowed testing with select users, helping measure model effectiveness and inform AI project prioritization.
- Implemented strict access controls and permissions to safeguard sensitive data while securely accessing and syncing data from AWS to Salesforce. The end-to-end solution was deployed within the customer's VPC to comply with the customer's need for enhanced data security.



Impact Delivered

- **90% reduction in integration time**: Slashed post-processing and integration time by 90%, reducing hundreds of development hours to just 25-30 hours.
- **Accelerating the time-to-value of AI models by 85%**: Reduced the overall AI initiative evaluation timeline from 6+ months to under 30 days.
- **Faster speed-to-market for the highest impact AI initiatives**: Enabled business and data teams to self-serve their AI implementation needs. Streamlined the feedback loop and iteration process, allowing teams to rapidly adjust and optimize AI solutions without technical bottlenecks.

Conclusion

AI Squared empowers financial services organizations to navigate the complexities of implementing AI at scale. By addressing the critical "last mile" challenge, our platform enables data science and engineering teams to rapidly integrate data and AI insights into critical web-based business applications. This accelerates time-to-market, drives higher AI adoption, enables continuous improvement through feedback, and ultimately helps institutions unlock the full potential of their AI investments to improve efficiency, enhance decision-making, and deliver better customer experiences.

Ready to Transform your Financial Services Operations? Schedule a Personalized Demo Today and See AI Squared in Action.

AI Squared helps large organizations bring AI to where work happens. We do this by leveraging our SaaS or on-prem platform which combines data sources with advanced AL/ML functionality and embeds intelligent insights into business applications. Trusted by the largest financial institutions, the most complicated supply chain logistics companies, and the US Department of Defense, we enable seamless collaboration between data science teams and business users, driving faster, more informed decision-making.

For more information visit us at **www.squared.ai**.

Bring AI To Where Work Happens

Our partners and customers