

# CASE STUDY

PROBLEMS WE SLOVED

CLIENT

ForwardLane

<http://forwardlane.com/>



# 01

## AI/NLP Based Intelligent Financial Advisory Assistant Chat-bot

Client: ForwardLane

ForwardLane is a New York based Fintech company is driving a new wave of financial innovation through leveraging advances in cognitive computing and data analytics. ForwardLane brings personalized high net worth investment intelligence to numerous investors around the globe.

It is a B2B platform used by private banks, Wealth Managers, Digital banks and insurance companies.

# 02 CLIENT'S CHALLENGES

ForwardLane was keen to push the limits of its digital business by creating a chatbot that would allow it to experiment with machine learning.

The aim was to change the way it interacts with its customers, but also to help its bankers make good decisions.

# 03 OUR SOLUTIONS

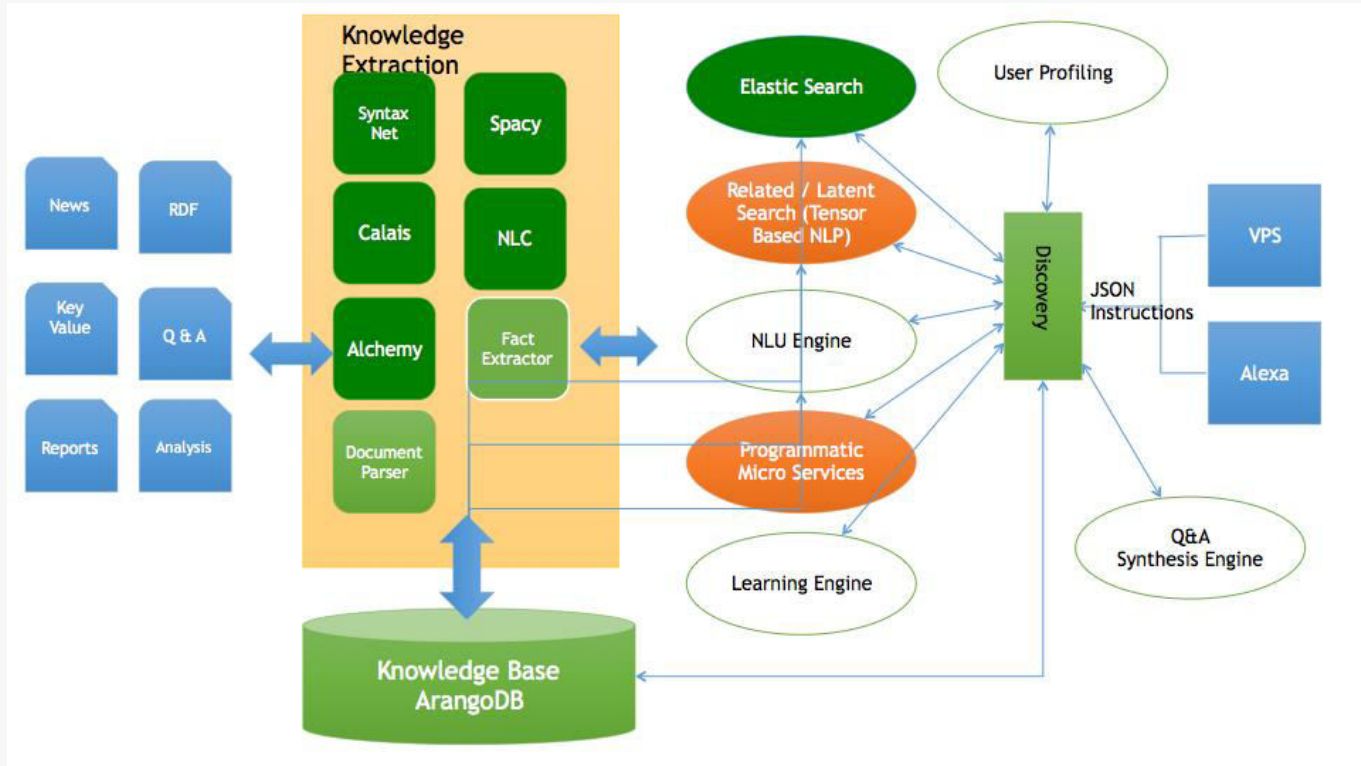
Mantra Labs was approached by ForwardLane to assist their innovative finance management goals.

We have provided a dedicated team of data scientists for NLP, machine and deep learning to create a financial assistant platform which deeply integrates, synthesizes and organizes firm and market data to provide following solutions:

- Entity Extraction
- Document Intelligence
- Dialogue Engine
- Intent Recognition
- Intelligent Search
- Cognitive Services

# 04

## High level architecture for AI/ML chatbot



# 05 OUR SOLUTIONS

The chatbot we developed offers vast range of functions such as:

- Knowledge base preloaded with **55,000 financial questions** and **8,000+ terms**.
- Trained with **4.7 million** additional questions.
- Dynamic, state-of-the-art cognitive synthesis engine.
- Contextualized responses based on prior conversations.
- Captures client interactions, history and recommendations for compliance.
- SaaS cloud based delivery or bespoke/containerized deployment solutions.
- Leverages advanced natural language understanding and deep learning to connect relevant data with human reasoning

# 06 BUSINESS BENEFITS

# Identify potential new customers and opportunities and is transforming the way it works with its corporate clients.

# Specialized AI that helps find and link insights to client data, saving time, driving growth and transforming the client experience.

# The Client could transform the digital client experience with personalized investment insights and expert conversations using the chat bot.

THANK YOU

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