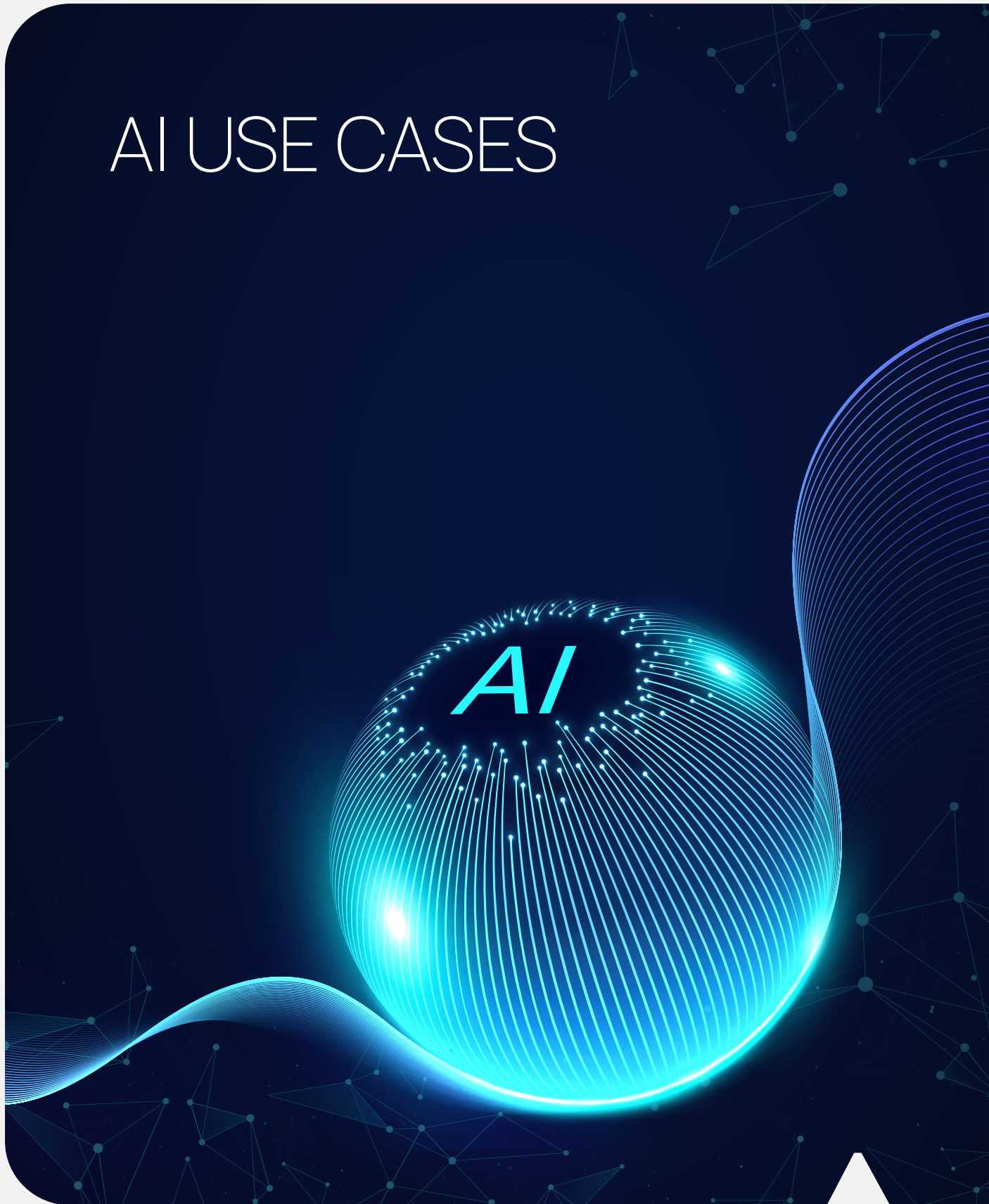# NuSummit®

AI USE CASES

Increasing Client Engagement Through Personalization

Business Need:

Firms face increasing pressure to deliver communications that resonate individually, driving engagement and client satisfaction while reducing churn. Manual segmentation and personalization efforts are slow and often lack the granularity for true one-to-one communication.

Solution:

AI platforms ingest vast volumes of client data — including portfolio activity, service interactions, demographic information, and digital engagement patterns — to develop rich, dynamic client profiles. Using natural language generation (NLG), the system produces tailored communications recommending relevant products, services, and insights, and optimizes delivery timing and channel preferences to maximize impact.

Outcomes:

- Significant lift in client engagement and campaign conversion rates.

- Greater client satisfaction through highly relevant, individualized interactions.

- Reduction in manual work, freeing teams to focus on strategy and creative optimization.

Caselet

AI enables hyper-personalized communications by analyzing client behaviors, preferences, and portfolios. By customizing outreach to individual needs and timing, firms can drive stronger engagement, improve retention, and reduce manual marketing work. This directly enhances revenue potential and client satisfaction while freeing teams to focus on strategy.

# Equipping Sales Teams with Client Intelligence

Business Need:

Sales professionals often juggle dozens of clients and prospects simultaneously. Researching each client's history, investment behaviors, and potential needs is labor-intensive and prone to gaps, undermining the ability to deliver confident, personalized advice.

Solution:

AI aggregates internal CRM data, portfolio information, market news, and external signals to generate real-time client intelligence. The system surfaces relevant trends, recent client activities, potential risks or needs, and suggested talking points. This empowers sales teams to walk into client meetings with specific, data-driven insights that strengthen trust and improve cross-selling and upselling opportunities.

Outcomes:

- Higher productivity and preparedness of sales teams.

- Deeper client relationships are built on personalized conversations.

- Increased revenue through better-targeted sales efforts.
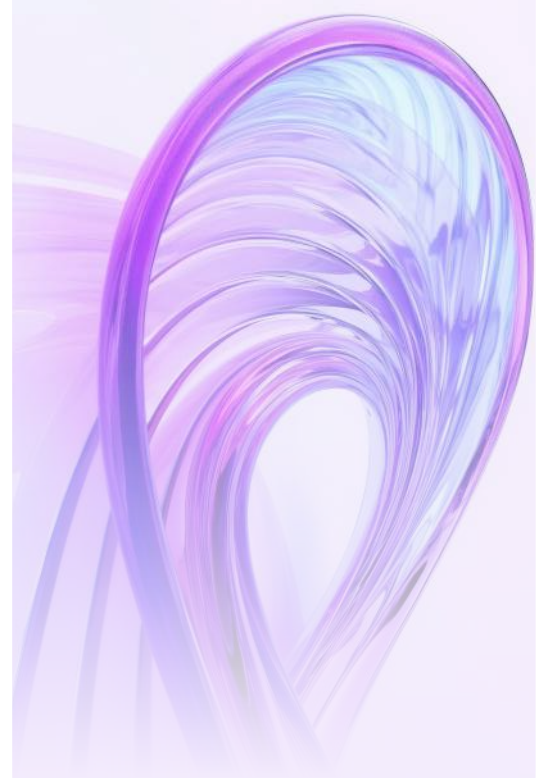
Caselet

Sales professionals need actionable insights to build trusted client relationships. AI compiles and analyzes client data to deliver talking points, risk signals, and recent activity summaries, empowering sales teams to deliver timely, relevant, and personalized conversations. The result is higher sales productivity and better cross-selling opportunities.

Accelerating Pitches and RFP Responses

Business Need:

Developing tailored proposals requires coordination across multiple teams and data sources, which can slow delivery and introduce inconsistencies in messaging, formatting, and compliance language.

Solution:

AI-driven document automation tools pull relevant firm-wide data, from performance metrics and case studies to compliance-approved content and assemble it into customized drafts. The system customizes language, graphics, and data to the prospect's specific goals, pain points, and industry context while ensuring adherence to compliance standards.

Outcomes:

- Reduction in time to produce high-quality pitches and proposals.

- Improved consistency in branding and messaging across teams.

- Higher win rates due to better alignment with client needs and faster delivery.

Caselet

In a competitive marketplace, speed and proposal customization are critical. AI automates the assembly of pitch materials and RFP responses using approved data and messaging, improving consistency, accelerating delivery, and increasing win rates with prospects.

Scaling Marketing Content Production

Business Need:

Marketing teams often struggle to produce personalized materials for various segments at scale, limiting their ability to quickly test messaging or pivot campaigns based on real-time client feedback.

Solution:

Generative AI tools draft multiple content variations, adapting language style, tone, messaging, and product focus to specific client segments, communication channels, and compliance requirements. This includes generating emails, social media posts, digital ads, and call scripts, freeing human teams to focus on strategic campaign oversight.

Outcomes:

- Faster content production cycles with reduced manual effort.

- Enhanced relevance and resonance across diverse client audiences.

- Increased campaign effectiveness and ROI.

Caselet

Generative AI helps marketing teams rapidly create compliant, customized content for multiple client segments and channels. This improves campaign agility, boosts engagement, and reduces content production bottlenecks, leading to more substantial ROI and faster time to market.

Driving Campaign Impact with Data-Driven Insights

Business Need:

Traditional marketing planning often relies on historical data and reactive insights, limiting the ability to design proactive campaigns that anticipate client needs and market trends.

Solution:

AI tools aggregate data from surveys, social media, CRM records, and market intelligence feeds, identifying emerging themes, client concerns, and gaps in competitor offerings. These insights fuel campaign plans, messaging strategies, and creative themes, enabling marketers to adapt quickly and stay relevant.

Outcomes:

- Campaigns better aligned to real-time client sentiment and market conditions.

- Faster planning cycles and increased agility in execution.

- Higher engagement and conversion rates from more relevant messaging.
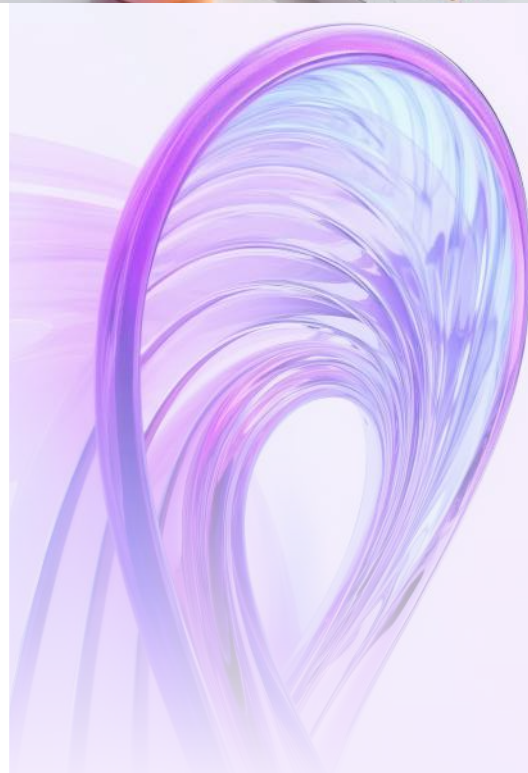
Caselet

AI synthesizes feedback and market data to propose proactive campaign themes, messaging strategies, and client targeting tactics. This ensures campaigns align with real-time client needs and market trends, increasing relevance and engagement.

Gaining Competitive Edge with Market Intelligence

Business Need:

Strategy and product teams spend countless hours reviewing market research, industry news, and competitor offerings to guide decisions, often struggling to distill insights quickly enough to inform timely actions.

Solution:

AI scrapes, summarizes, and compares vast amounts of competitor and market data, delivering concise reports highlighting key differentiators, emerging risks, and opportunities. The system can also generate side-by-side comparisons of products, pricing, and feature sets to inform go-to-market strategies.

Outcomes:

- Faster decision-making with near real-time market intelligence.

- Clearer understanding of competitive positioning.

- Stronger strategic planning and product differentiation.
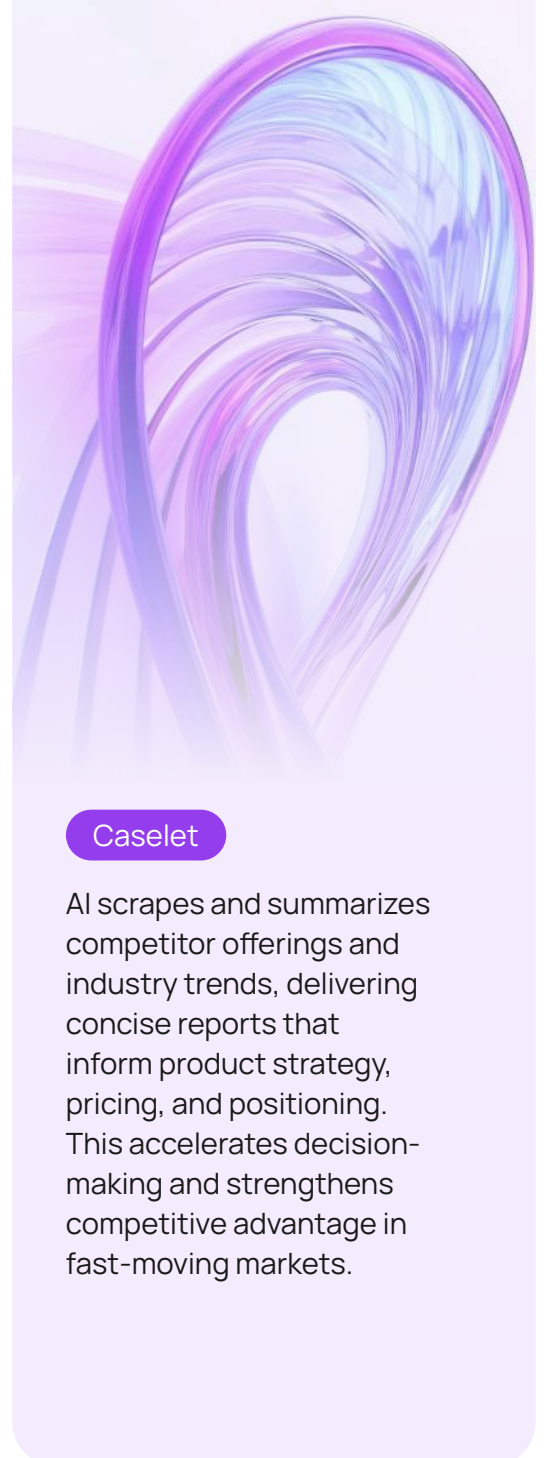
Caselet

AI scrapes and summarizes competitor offerings and industry trends, delivering concise reports that inform product strategy, pricing, and positioning. This accelerates decision-making and strengthens competitive advantage in fast-moving markets.

Accelerating Innovation with AI-Driven Product Ideation

Business Need:

Product teams often lack tools to sift through massive amounts of client feedback, market data, and competitor activity to identify viable new product ideas.

Solution:

AI analyzes client requests, survey results, support tickets, and external market data to detect patterns and unmet needs. It then generates product concept briefs or feature suggestions, including market sizing estimates and potential differentiators, which feeds into ideation sessions and development roadmaps.

Outcomes:

- Faster and more focused product development cycles.

- Offerings more closely aligned with client needs.

- Enhanced ability to anticipate and lead market trends.

Caselet

AI helps product teams identify gaps and opportunities by analyzing client feedback, market shifts, and competitor data. It generates new product ideas and concept briefs, enabling firms to anticipate client needs, improve market fit, and accelerate development.

Streamlining Business Plan Creation

Business Need:

Assembling comprehensive business plans that merge financial forecasts, client growth projections, market analysis, and operational plans often requires significant manual data gathering and formatting.

Solution:

AI pulls data from internal systems and external sources, consolidating it into cohesive drafts for business plans and committee documents. These drafts include charts, scenario analyses, and tailored commentary, which human teams can review and finalize.

Outcomes:

- Shorter preparation time for high-stakes presentations.

- Consistent and data-backed narratives that build committee confidence.

- Faster approvals and alignment on strategic initiatives.

Caselet

Creating data-driven business plans and committee documents often slows initiatives. AI consolidates data into draft plans, improving consistency and shortening approval cycles, which helps firms pivot faster and build stakeholder confidence.

Enhancing Risk Detection with Real-Time Market Intelligence

Business Need:

Risk and trading teams must process vast amounts of data to detect emerging threats and market shifts that could affect portfolios or client assets.

Solution:

AI continuously scrapes news sources, regulatory filings, analyst reports, and social media feeds, transforming unstructured information into structured risk signals. These feed predictive models that identify potential market-moving events or sector or security risk profile shifts.

Outcomes:

- Faster response to emerging market risks.
- Improved portfolio hedging and adjustment strategies.
- Increased alpha generation through early detection.

Caselet

AI continuously monitors global data sources, transforming unstructured information into predictive signals on market movements and risks. This empowers trading and risk teams with early warnings, improving portfolio protection and alpha generation.

# Stress Testing Strategies with Synthetic Scenarios

Business Need:

Portfolio managers and risk teams often struggle to model scenarios for rare events or extreme conditions not well represented in historical datasets.

Solution:

Generative AI creates synthetic datasets that simulate potential future market conditions, tail events, or stress scenarios. These data sets enable robust backtesting of investment strategies and validation of risk models before deployment.

Outcomes:

- Improved strategy resilience under extreme conditions.

- Enhanced risk management practices.

- Better compliance with regulatory stress testing requirements.
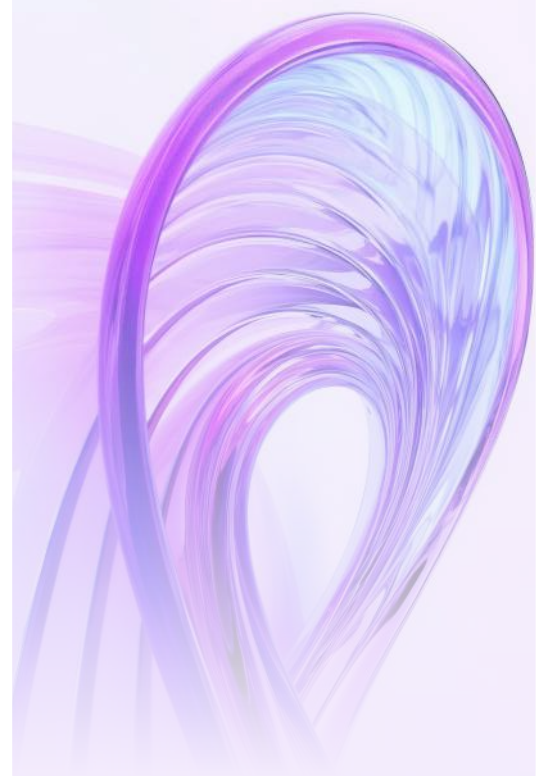
Caselet

Generative AI creates synthetic data to simulate extreme market conditions, enabling firms to back-test strategies and validate risk models beyond historical datasets. This improves portfolio resilience and strengthens compliance with regulatory stress testing requirements.

Reducing Compliance Risk with AI-Powered Document Summarization

Business Need:

Manual review of regulatory updates, legal documents, and compliance records is slow, error-prone, and consumes significant human resources. Delays or missed insights can lead to compliance breaches and reputational damage.

Solution:

AI systems use natural language processing to search, summarize, and compare regulatory documents, legal filings, and compliance guidelines. The system flags inconsistencies, suggests relevant excerpts, and generates concise summaries for review and decision-making.

Outcomes:

- Faster detection of potential compliance risks.
- Reduced manual effort in legal and regulatory analysis.
- Improved compliance posture and audit readiness.

Caselet

AI automates the summarization of regulatory and legal documents, helping compliance teams detect potential issues faster while reducing manual review workloads. This strengthens compliance readiness and reduces regulatory risk.

Accelerating Risk and Performance Reporting

Business Need:

Compiling data for periodic reports involves gathering information from multiple systems, validating data quality, and ensuring consistent messaging under tight deadlines.

Solution:

AI automates data aggregation, performs real-time validation checks, and drafts reports with dynamic visualizations and commentary tailored to audience needs. These can include portfolio performance reviews, risk summaries, and operational KPIs.

Outcomes:

- Shorter reporting cycles with fewer manual errors.

- Increased trust and transparency with clients and regulators.

- More capacity for risk teams to focus on proactive initiatives.
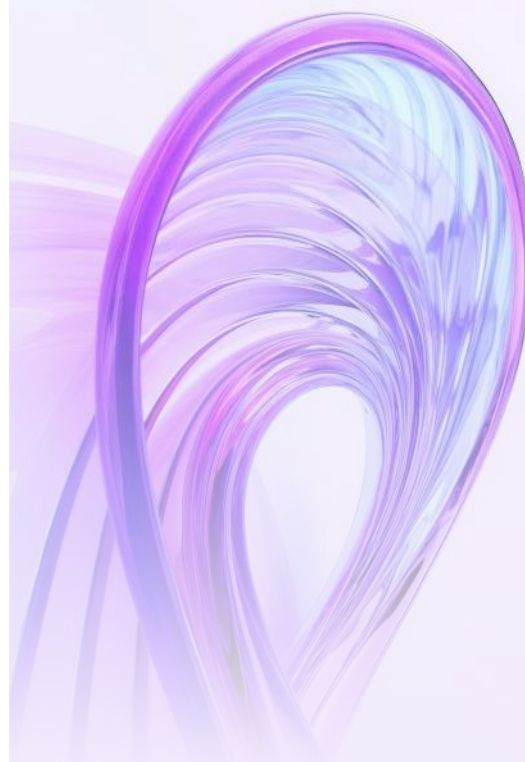
Caselet

AI automates the aggregation and drafting of risk and performance reports, increasing reporting speed and accuracy. This builds trust with clients and regulators, reduces manual workload, and frees risk teams to focus on proactive analysis.

# Improving Data Quality with Augmented Security Master Updates

Business Need:

Security data is often fragmented across multiple sources, requiring teams to reconcile discrepancies manually. This slows downstream operations and creates the potential for costly errors.

Solution:

AI-driven data reconciliation tools ingest information from multiple vendors and internal systems, identify inconsistencies, and suggest updates to security master records with confidence scoring.

Outcomes:

- Improved data accuracy across systems.
- Faster reconciliation cycles.
- Reduced operational risk and trade breaks.
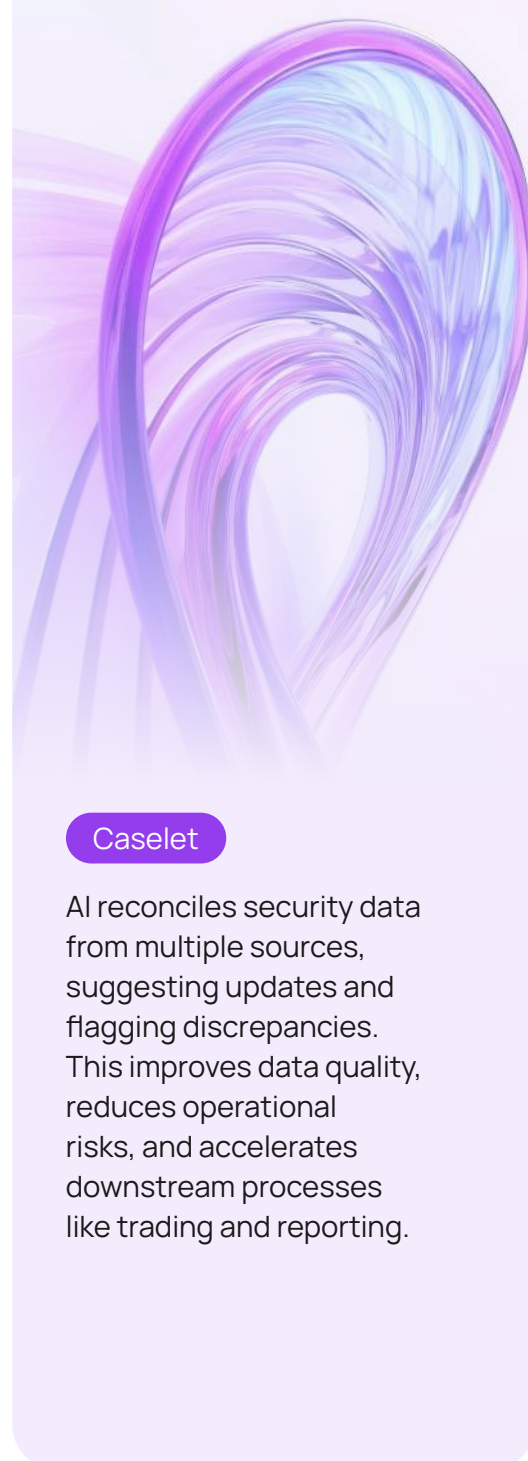
Caselet

AI reconciles security data from multiple sources, suggesting updates and flagging discrepancies. This improves data quality, reduces operational risks, and accelerates downstream processes like trading and reporting.

Accelerating Software Development with AI-Enabled Code Generation

Business Need:

Manual coding, debugging, and maintenance consume valuable developer time and create bottlenecks in IT project delivery.

Solution:

AI models assist with code generation, debugging, and documentation. Developers can input requirements in natural language and receive code snippets, test scripts, or recommended refactoring options.

Outcomes:

- Faster delivery of high-quality software.
- Reduced human error and technical debt.
- More time for developers to focus on innovation.
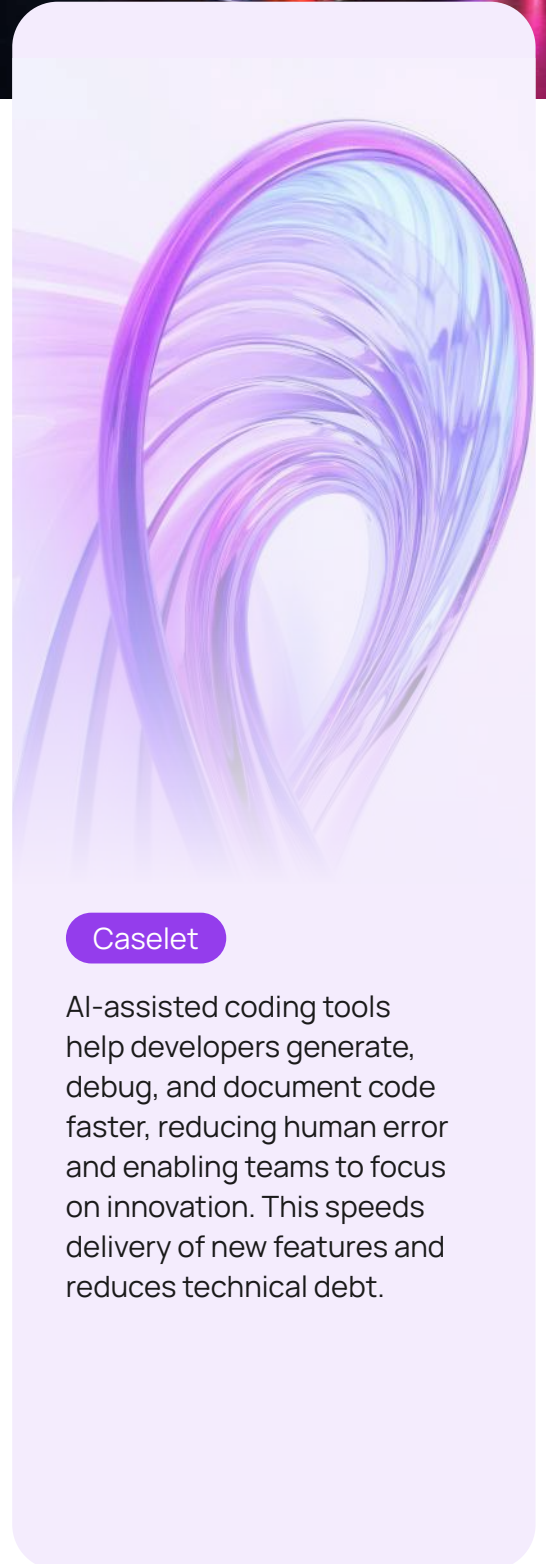
Caselet

AI-assisted coding tools help developers generate, debug, and document code faster, reducing human error and enabling teams to focus on innovation. This speeds delivery of new features and reduces technical debt.

Delivering Customized, On-Demand Business Reporting

Business Need:

Creating ad-hoc reports for various stakeholders involves gathering data from siloed systems, aligning formats, and ensuring accuracy, which often slows decision-making.

Solution:

AI-driven reporting tools allow users to request customized reports on demand using natural language. The system queries internal data sources, generates tailored charts and commentary, and delivers reports directly to user dashboards or emails.

Outcomes:

- Faster, on-demand insights for stakeholders.
- Improved data-driven decision-making.
- Reduced manual reporting workload.
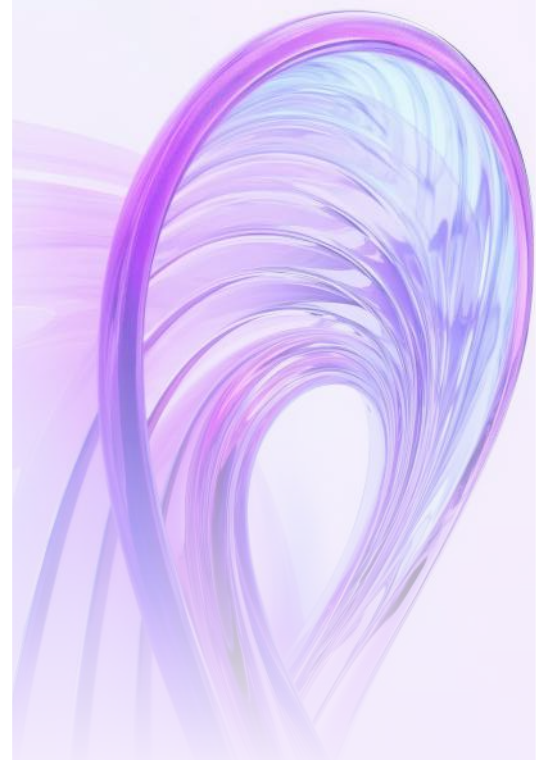
Caselet

AI-driven reporting tools produce tailored reports responding to natural language queries, consolidating financial, operational, and tech data into actionable insights. This improves executive decision-making and reduces dependency on manual reporting teams.

Streamlining Paperwork with Smart Form Assistants

Business Need:

Filling forms and internal documentation often requires staff to manually re-enter or search for data, leading to delays and inconsistencies.

Solution:

AI-powered assistants pre-populate forms with data from existing systems, suggest completion of missing fields, and flag inconsistencies or compliance issues before submission.

Outcomes:

- Reduced time spent on paperwork and form processing.

- Improved data consistency and accuracy.

- Enhanced compliance and audit readiness.
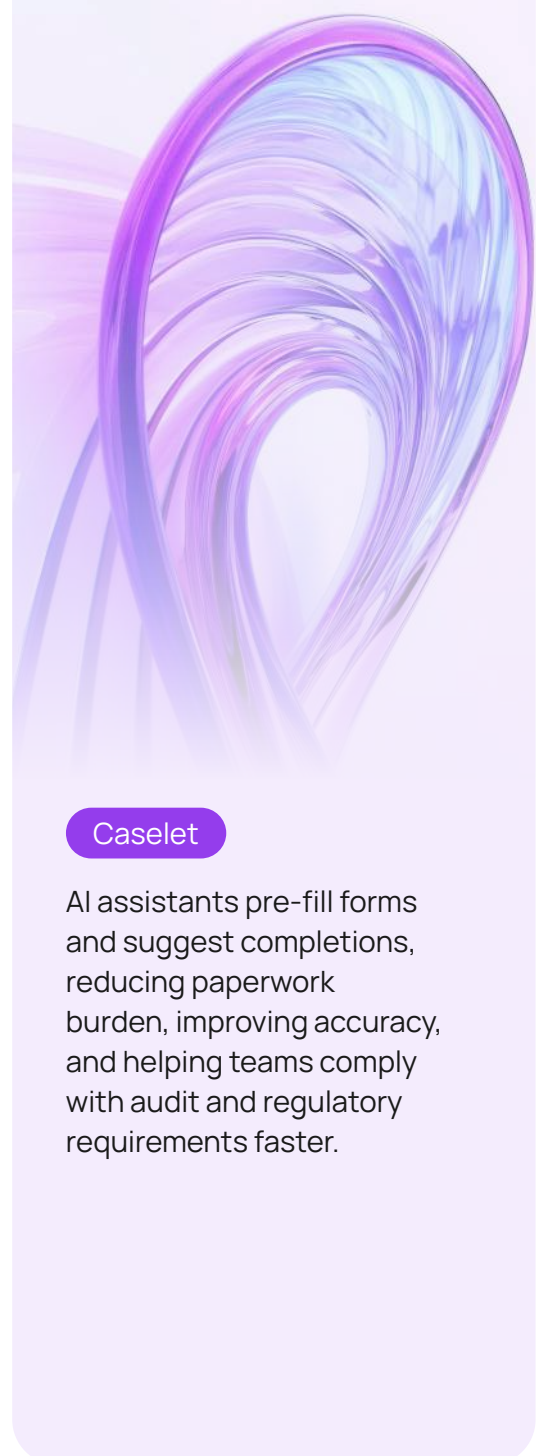
Caselet

AI assistants pre-fill forms and suggest completions, reducing paperwork burden, improving accuracy, and helping teams comply with audit and regulatory requirements faster.

Enhancing Client Service with AI-Driven, Intelligent Inquiry Responses

Business Need:

Client service teams spend significant time interpreting inquiries, searching internal systems for answers, and crafting responses, often under time pressure.

Solution:

AI interprets incoming queries, matches them to similar past questions, searches internal knowledge bases, and drafts personalized, compliant responses that client service representatives can review and approve.

Outcomes:

- Faster response times to client queries.
- Consistent, high-quality communications.
- Improved client satisfaction and loyalty.

Caselet

AI interprets client questions, searches knowledge bases, and drafts personalized responses for review, enabling service teams to answer faster and more consistently. This improves client experience and builds loyalty.

Delivering Personalized Periodic Investor Reports

Business Need:

Manually producing investor reports tailored to each client's specific holdings, preferences, and communication style is time-consuming and limits scalability.

Solution:

AI systems automate drafting personalized investor reports, incorporating real-time performance data, market commentary, and tailored messaging based on client preferences and portfolio composition.

Outcomes:

- Enhanced client experience through customized insights.

- Increased reporting efficiency and scalability.

- Higher client retention and share of wallet.

Caselet

AI automates the creation of investor reports tailored to client portfolios and communication preferences, ensuring timely, customized insights that deepen client trust and engagement.

About NuSummit

NuSummit is a global technology leader in AI-led digital transformation, specializing in applications, data, analytics, cloud, and cybersecurity. With over 300 clients worldwide, including 22 Fortune 500 companies, NuSummit supports organizations across industries. Our core expertise lies in banking, insurance, and capital markets, where we offer specialized solutions for these sectors.

With over two decades of experience and 3,000+ professionals, we deliver AI-driven, end-to-end solutions that integrate advanced cloud infrastructure and cybersecurity. Certified to top industry standards and backed by a robust partner ecosystem of hyperscalers and niche innovators, NuSummit is a trusted partner for secure, impactful digital innovation.

For more information, write to connect@nusummit.com.

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