

CIRA Digital Assistant Platform Standard Edition



For advisors, agents, and customers

Why CIRA Digital Assistant Platform Standard Edition?

- 50 percent of financial advisor time is lost through operational tasks such as filling up forms, opening accounts, and consulting policies.
- Complex, inefficient processes hurt financial firms through unrealized revenue, high cost, high risk, and bad customer experience.
- Compliance misses due to errors in information, policy ignorance, and form filling errors in transactions can all lead to regulator fines.
- Internally-built artificial intelligence (AI) powered solutions have high total cost of ownership (TCO), siloed deployments, and miss out on industry standards.
- Generic vendors of AI platforms are less scalable since they use machine learning without any specialized focus on financial domains.

Product overview

CogniCor is purpose-built for the financial industry and used by leading wealth and insurance firms. It's AI digital assistants "supercharge" financial advisor productivity at scale. Using a library of pre-built conversational digital assistants, CogniCor enables financial institutions to increase efficiency of common operations in the wealth and insurance industries.

Product features

Natural language query pipeline

- Crisp direct answers to product and policy questions.

Automated Knowledge ingestion

- Ingest documents from existing content management systems (CMS) and maintain two-way sync.

Task Automation

- Connect to robotic process automation (RPA) systems and customer relationship management (CRMs) to do straight-through processing and live status updates.

Built-in knowledge graph libraries

- Library of pre-trained knowledge elements in the wealth and insurance domain cuts your roll time drastically.

Community knowledge curation

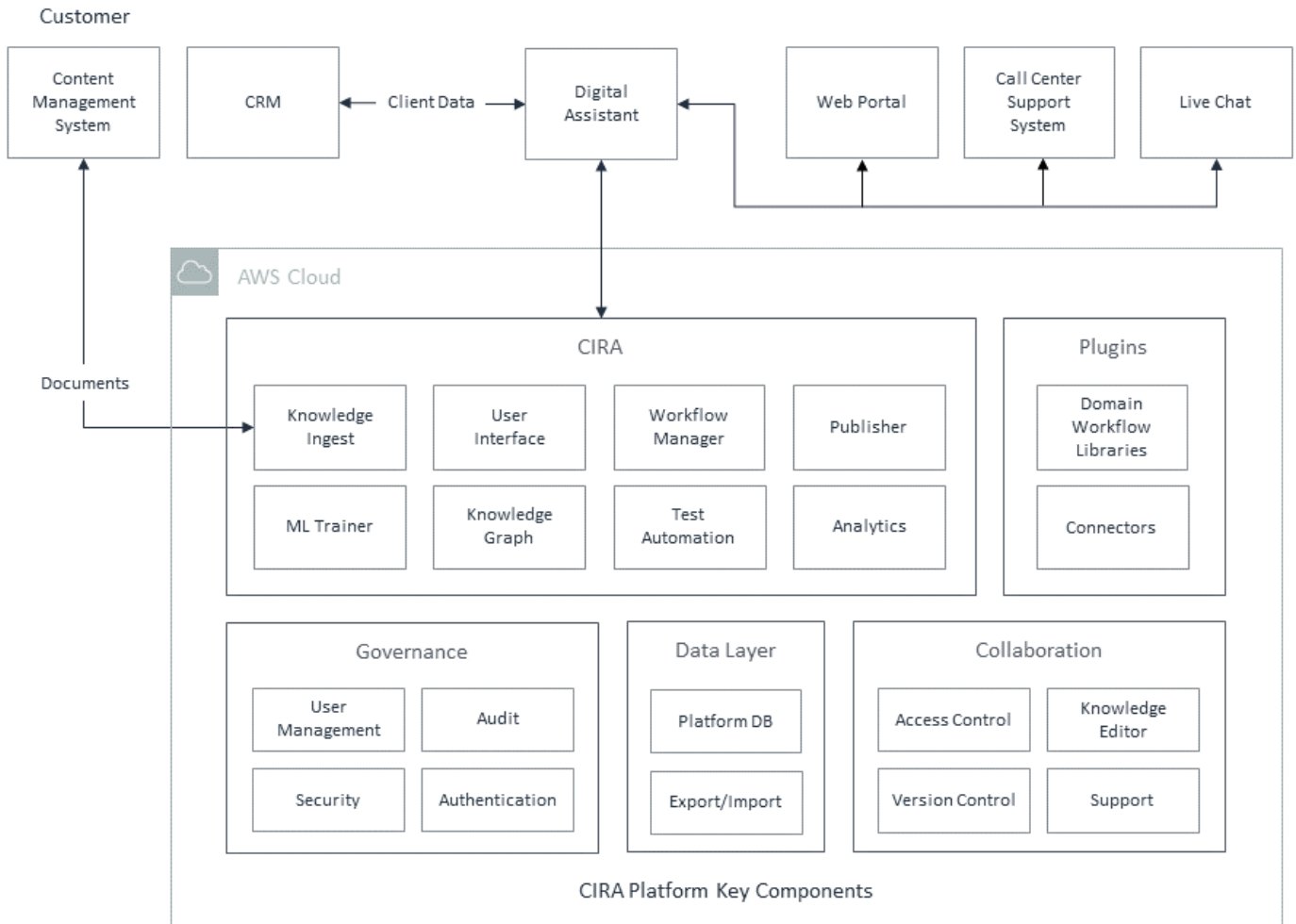
- Collect knowledge from subject matter experts (SMEs) for areas that lack sufficient knowledge.

Assisted Learning Mode

- Doubles up as learning assistant, onboarding, and training new advisors and contact center staff faster than traditional methods.

How it works

CIRA is built from CogniCor's wealth management and fintech domain understanding and trained with 200,000+ enterprise documents. The platform offers an intuitive way to build AI-powered digital assistants by choosing from pre-built templates to be enhanced with digitally ingested enterprise knowledge libraries.



Differentiators

- Natural-language understanding (NLU) technology based on domain knowledge graphs, which enable faster rollout and easier maintenance.
- Two-way sync with your existing knowledge management systems.
- Domain specific libraries for common use cases.

What our customers are saying



Investing early on in transformative technologies such as CogniCor's CIRA platform allowed LPL to create a digital knowledge platform replicating the experience of some of our most experienced service agents.

- Tim Hodges, Former EVP of Service and Trading, LPL Financial

Data Points

10x

Reduction in roll out time

1000X

Reduction in training data

95%

Accuracy

35%

Reduction in call transfers

Additional Resources

- [Request case study](#)
- [Schedule demo](#)

Solution available in [AWS Marketplace](#)