

Global Financial Services Firm Selects Progress Data Platform to Build AI-Powered Legal Assistant

CASE STUDY



COMPANY

Financial Services
Advisory Firm

INDUSTRY

Financial Services

PRODUCT

Progress® Semaphore™
Progress® MarkLogic®

COUNTRY

Netherlands

SUMMARY

A global financial services firm sought to add new levels of efficiency to its research methods for legal advisory services. On average, associates spend about four hours compiling a dossier of relevant legislation, case law and articles, along with a detailed analysis. By harnessing the Progress Data Platform, the firm built an AI-driven legal assistant that is reducing completion time to just a few minutes.

Challenge

This global financial services firm employed an army of individuals who manually researched multiple sources for changes and updates to law for its clients, an inefficient and costly task in terms of time, labor and corporate risk. As a first step to replace its manual processes, the company deployed the Progress® MarkLogic® platform to establish a centralized knowledge hub to store and retrieve all relevant information.

They also chose the Progress® Semaphore™ Semantic AI platform to enable fast and accurate classification so users can find what they need when they need it, speeding an inefficient manual process while increasing accuracy.

Seeking to add additional levels of efficiency to the process, the firm sought to harness artificial intelligence. The team believed an AI engine could accomplish the task faster and more consistently and began investigating dedicated AI. They determined that a more tailored solution to increase accuracy and detail was required. That's where Progress once again came into the picture.

Solution

Already storing vast quantities of research information in the MarkLogic data platform and using the knowledge modeling management capabilities of the Semaphore Semantic AI platform to drive the classification of content, the firm was well positioned to extend those capabilities to provide guidance to an AI solution on how information can be interpreted and related to key content. A use case included deploying an AI-driven engine to determine how concepts relate to legislation, the most applicable case law and what documents best match the concept.

If enough information is not available in the AI model, the system then automatically performs a vector search to return semantically relevant content. From there, relevant parts of the model, legislation, case law and any other additional information sourced from the MarkLogic platform is passed to the AI solution for reasoning and insight.

Results

The organization reports that a four-hour research process to compile and analyze information can now be completed in a matter of minutes. Legal associates now have more time freed up to work on higher value projects.

Additionally, responses from the AI solution are systematically measured against a series of human-created responses to maintain quality and accuracy, giving users trust in the responses, negating the need for further validation.

Today, the intelligent search experience provides trusted and relevant results fast—within a matter of minutes. With a single action, information is instantly delivered to customers over multiple channels, enabling those customers to create and receive relevant, personalized information.

The firm has realized decreased costs and efficiencies in gathering, selecting and processing the information, while improving knowledge sharing across the organization. The firm is currently exploring further uses of an AI guided approach across other areas of the business.



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