

# 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

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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

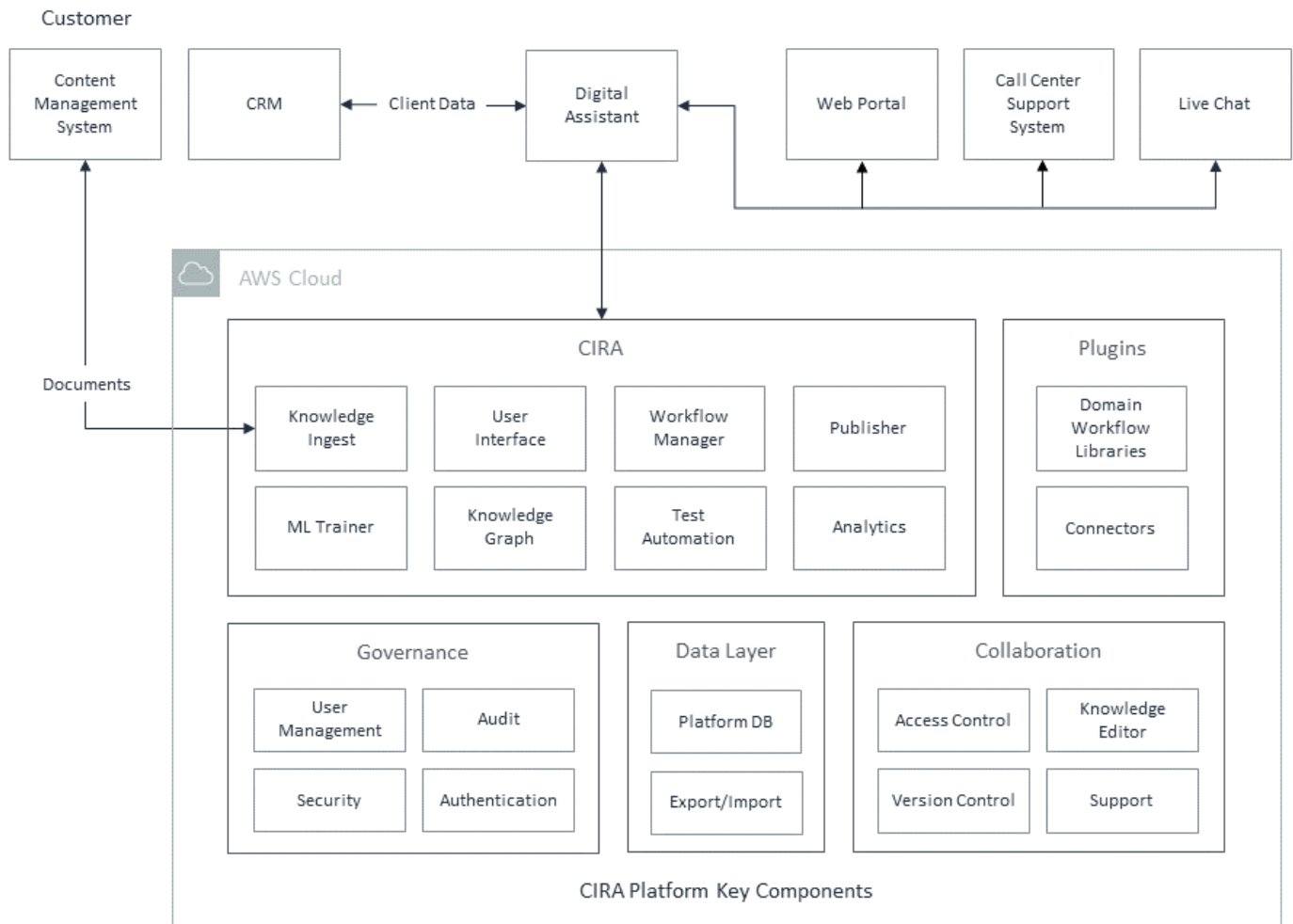
- Collect knowledge from subject matter experts (SMEs) for areas that lack sufficient knowledge.

### 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](#)