

precisely

Smarter, Faster, Safer: **The AI Changing How Regulated** **Industries Communicate**

Key Takeaways:

- ✓ Precisely has built AI on Value, Control, and Trust to ensure ROI, compliance, and transparency for organizations.
- ✓ Intelligent Search speeds compliance and reduces wasted time by finding the right content quickly.
- ✓ AI Sentiment Analysis and Template Migration protect brand trust and keep communications compliant.
- ✓ Conversational AI and Smart Escalation improve resolution rates while reducing contact center strain.
- ✓ Text-to-Speech scales personalization across languages, channels, and customer journeys.



Regulated Industries Need AI They Can Trust

Financial services, insurance, utilities, and healthcare organizations are under pressure to balance customer experience, compliance, and speed. In fact, [85% of knowledge workers](#) say AI helps them focus on more important work. For business leaders responsible for customer communications and compliance-sensitive processes, outdated systems and siloed content make it difficult to deliver efficient, compliant, and customer-friendly regulated communications such as bills and invoices, claims processing, contract terms, and confirmation notices.

To solve these challenges, Precisely's AI is built on three core principles:

- ✓ **Value:** AI should reduce effort and deliver measurable ROI.
- ✓ **Control:** Customers must govern how AI is configured to ensure compliance.
- ✓ **Trust:** AI must be explainable, transparent, and reliable.

With AI dominating boardroom agendas and industry conversations, many leaders feel pressured to implement AI often without clarity on what is practical or safe. We recognize this noise and the uncertainty it creates. That is why Precisely delivers AI that is powerful, safe, and designed specifically for regulated industries.

The AI Driving Transformation and Innovation for Regulated Industries



Cut Through the Noise, Find Brand Approved Content Fast

For business leaders responsible for customer communications and compliance-heavy tasks, finding the right, approved content at the right moment is critical. A loan servicing manager might be searching for the correct terms for a customer letter, a credit officer for an approved disclosure, or an insurance team member for the proper claims template. Searching across fragmented systems often leads to errors, delays, or non-compliant messaging. AI Intelligent Search solves this by enabling teams to find approved content, templates, and assets instantly.

WHY IT MATTERS

- ✓ **Saves time:** Employees spend less time searching and more time serving customers.
- ✓ **Reduces risk:** Ensures only approved, up-to-date content is used.
- ✓ **Protects brand:** Keeps all communications consistent across channels.

PICTURE THIS

A loan servicing manager quickly locates the most recent repayment notice template, applies the approved reminder content, and sends it in less than a minute. This ensures the right message reaches the customer every time, saves hours of wasted searching, and eliminates the risk of outdated communications.



Refine Tone and Stay On-Brand with Sentiment Analysis

Tone and clarity are critical, especially in regulated industries where miscommunication of critical information such as an unclear repayment date, a confusing claims instruction, or a poorly worded policy change can damage trust. AI Sentiment Analysis reviews customer communications for harsh, unclear, or off-brand language before they are delivered.

WHY IT MATTERS

- ✓ **Improves trust:** Keeps communications professional, empathetic, and aligned with brand values.
- ✓ **Reduces compliance risk:** Flags language that may cause regulatory or reputational harm.
- ✓ **Drives consistency:** Ensures customer-facing teams use the same tone across every channel.

PICTURE THIS

An insurer prevents policy update letters from sounding overly technical or dismissive. AI scans the content, highlights unclear phrasing, and suggests improvements so messages remain customer-friendly and compliant.



Transform Legacy Templates into Digital-Ready Assets Faster and at Scale

Legacy templates slow innovation, introduce errors, and make compliance audits difficult. Years of accumulated templates often create a tangled web of formats, layouts, and one-off workarounds that are expensive to maintain and risky to change. The sheer complexity and cost of untangling these systems breeds inertia, leaving organizations stuck with outdated processes. AI Template Migration breaks this cycle by automating the extraction of layouts, data fields, and rules from legacy templates and converting them into modern, omnichannel-ready formats.

WHY IT MATTERS

- ✓ **Accelerates transformation:** Cuts migration timelines by up to 60 percent.
- ✓ **Reduces errors:** Minimizes manual re-keying that leads to inconsistencies.
- ✓ **Future-proofs communications:** Ensures assets are ready for digital-first engagement.

PICTURE THIS

A bank preparing for new disclosure regulations migrates hundreds of outdated forms into digital-ready templates within weeks instead of months. Compliance deadlines are met on time, costly manual work is eliminated, and teams stay focused on serving customers.



Turn Complex Language into Clear Customer Communications

The complexity of regulated communications can often overwhelm customers with dense or confusing language. To solve this, Readability Agent evaluates clarity against plain-language and regulatory readability standards, then recommends specific edits.

WHY IT MATTERS

- ✓ **Improves comprehension:** Helps customers clearly understand obligations and next steps.
- ✓ **Lowers risk:** Ensures communications meet required readability standards.
- ✓ **Reduces call volume:** Prevents confusion before it reaches your contact center.

PICTURE THIS

A credit card issuer runs adverse action notices through Readability Agent. The tool flags long sentences and jargon, proposes simpler phrasing, and confirms the final notice meets the target grade level before it goes out to customers.



Update Sensitive Content with Confidence

In regulated industries, policies and standards change frequently. Teams are often forced to rewrite large volumes of content, which is slow, costly, and inconsistent. Contextual Rewrite Agent automates updates by aligning text with current regulations and brand voice. It also simplifies complex language for customer clarity.

WHY IT MATTERS

- ✓ **Speeds updates:** Automates large-scale content revisions across template libraries.
- ✓ **Maintains consistency:** Aligns messaging with the latest regulatory and brand guidelines
- ✓ **Empowers teams:** Enables non-technical users to modernize content without starting from scratch.

PICTURE THIS

An insurer updates claim correspondence after a regulatory change. The agent rewrites the affected sections to reflect the new disclosures, proposes a concise customer-friendly summary, and preserves all required statements.



AI Chatbots Handle Common Queries So Your Team Moves Faster

Customers expect fast, accurate responses and are increasingly comfortable interacting with chatbots after years of using them for banking, travel, shopping, and other services. At the same time, contact centers face rising call volumes, higher customer expectations, talent shortages, and constant pressure to reduce costs. Conversational AI Chatbots bridges this gap by understanding intent, answering routine inquiries instantly, and escalating complex issues when needed.

WHY IT MATTERS

- ✓ **Boosts efficiency:** Handles repetitive queries 24/7, reducing agent workload.
- ✓ **Improves CX:** Customers get instant answers without long wait times.
- ✓ **Drives resolution rates:** Fewer unresolved calls and repeat contacts.

PICTURE THIS

A customer logs in after hours to check a billing question. Conversational AI instantly provides the account balance, offers an option to request a payment extension, and answers common FAQs. When the customer's question is more complex, it escalates seamlessly to an agent for follow-up the next day.



Automatically Hand-Off Complex Problems to a Live Agent

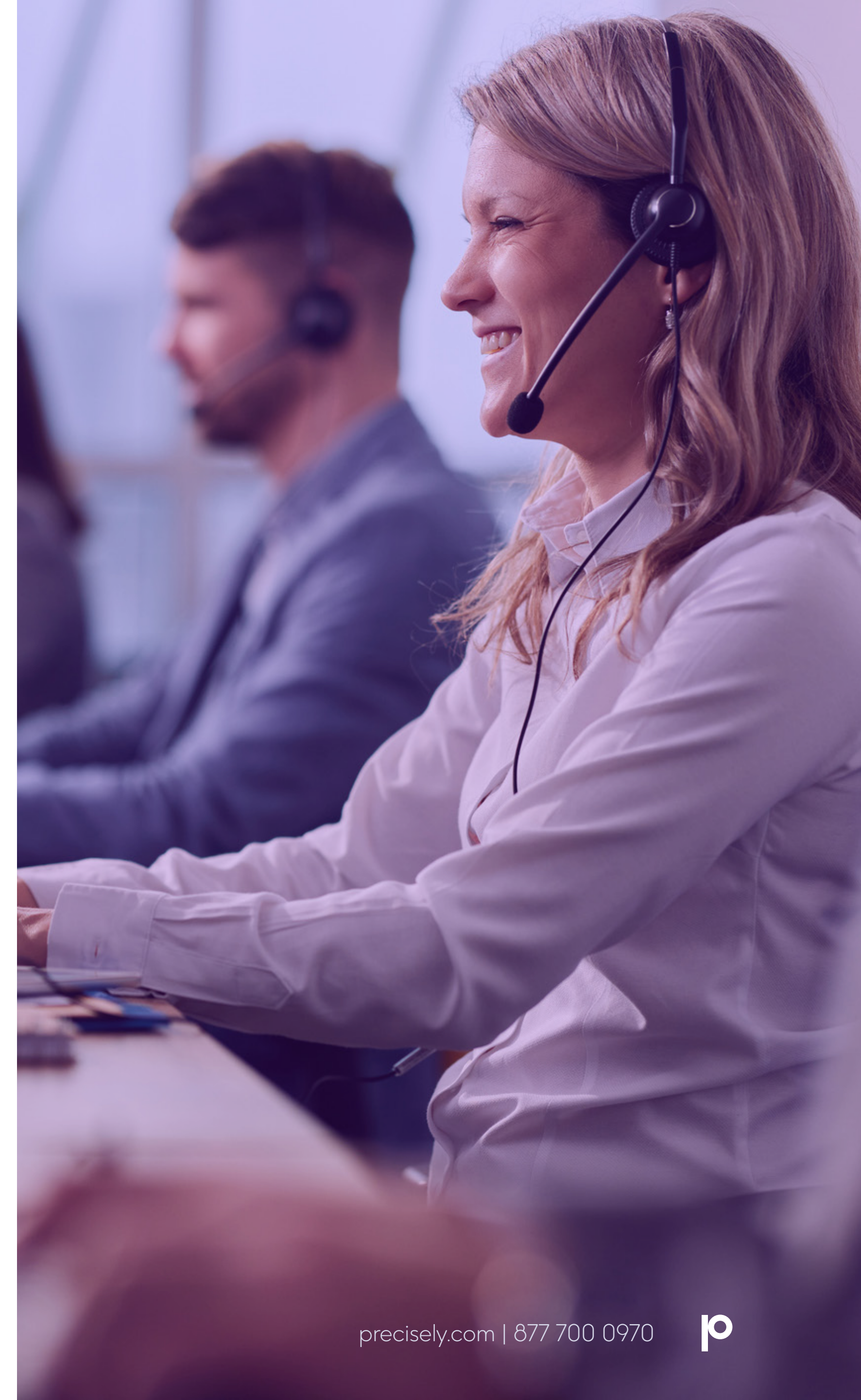
Despite the ability of conversational chatbots to take on increasingly complex requests, AI cannot handle every issue. Smart Escalation identifies frustration or priority needs and connects customers to live agents with full context, ensuring problems are resolved quickly and without repetition.

WHY IT MATTERS

- ✓ **Faster resolutions:** Agents receive the complete conversation history and customer data.
- ✓ **Improves satisfaction:** Customers avoid the frustration of repeating themselves.
- ✓ **Supports compliance:** Ensures sensitive issues are handled by a trained human.

PICTURE THIS

A healthcare provider's chatbot escalates a patient's benefits inquiry to a live agent and passes along the full chat transcript. The agent picks up immediately with full context, avoids confusion and frustration, and resolves the question with high patient satisfaction.



Scale Personalized Video Communications Globally

Policy updates, loan terms, and utility bills can be dense, confusing, and even harder to follow for those reading in a second language. AI Text-to-Speech turns these documents into natural, multilingual voiceovers for personalized videos in more than 130 voices and 30 languages, making critical information easier to understand and act on.

WHY IT MATTERS

- ✓ **Increases engagement:** Video and voice communications improve comprehension.
- ✓ **Scales inclusivity:** Supports multilingual and accessibility needs.
- ✓ **Reduces costs:** Cuts print and call center reliance by explaining policies at scale.

PICTURE THIS

A new customer struggles with long, complex policy documents in English. They receive a welcome video, select Spanish, Korean, or Arabic as their preferred language, and quickly understand the key details. The customer feels confident in their coverage and far more satisfied with the experience.





Your AI FAQs Answered:

Q1: How does Intelligent Search reduce compliance risk?

By ensuring employees only use the most current, approved assets, Intelligent Search prevents outdated or incorrect communications from reaching customers.

Q2: How does Template Migration impact transformation timelines?

Organizations reduce migration timelines by up to 60 percent, helping regulated industries modernize decades of legacy templates.

Q3: What role does sentiment analysis play in customer trust?

It ensures messages are clear, empathetic, and aligned with brand tone. This builds trust while protecting against regulatory risks.

Q4: Can chatbots replace human agents?

No. Chatbots handle routine inquiries, but Smart Escalation ensures customers always connect with a live agent when needed.

Q5: How does Text-to-Speech enhance engagement?

It transforms static communications into dynamic, accessible video content that improves comprehension and customer satisfaction.

Trusted AI for Regulated Industries

The future of customer communications in regulated industries will be smarter, faster, and safer with AI that can be safely leveraged to augment and enhance existing policies and processes. We are building AI capabilities designed with compliance, productivity, and customer engagement in mind.

With Precisely's guiding principles of Value, Control, and Trust, leaders can confidently modernize communications, knowing their AI is explainable, reliable, and built for the realities of regulated industries.



About Precisely

As a global leader in data integrity, Precisely ensures that your data is accurate, consistent, and contextual. Our portfolio, including the Precisely Data Integrity Suite, helps integrate your data, improve data quality, govern data usage, geocode and analyze location data, and enrich it with complementary datasets for confident business decisions. Over 12,000 organizations in more than 100 countries, including 95 of the Fortune 100, trust Precisely software, data, and strategy services to power AI, automation, and analytics initiatives. Learn more at www.precisely.com.

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