

precisely

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

Key Takeaways:

- ✓ EngageOne™ RapidCX has a growing library of governed AI agents that work across the communication lifecycle: finding and reusing approved content, creating and modernizing on-brand content, keeping communications clear and compliant, protecting sensitive data, and recommending the next best action.
- ✓ EngageOne™ RapidCX supports Model Context Protocol (MCP), connecting AI agents into communications workflows to trigger, view, and inspect customer engagement activity, with all requests user-scoped and audit logged.
- ✓ Precisely builds governed AI for regulated industries on Value, Control, and Trust: measurable ROI, customer-governed configuration, and explainable, auditable AI.
- ✓ Every agent is assistive and opt-in. A person reviews and approves every result, and full audit trails record how AI contributed, so teams gain speed without giving up control.



Governed AI for Customer Communications

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 For business leaders responsible for customer communications and compliance-sensitive processes, outdated systems and siloed content make it difficult to deliver efficient, compliant, and customer-friendly regulated communications such as bills and invoices, claims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 built AI agents and tools 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 governed AI through EngageOne™ RapidCX, a customer communications management (CCM) built specifically for regulated industries.

EngageOne™ RapidCX AI Agents for Regulated Industries

EngageOne™ RapidCX's governed AI agents span the full communication lifecycle. Intelligent Search and Intelligent Archive Search find and reuse approved content. The Communications Builder and Contextual Rewrite agents create and modernize it. The Readability and Sentiment Analysis agents keep it clear and on-brand. The Compliance Risk Scoring Agent and PII Masking Insight Agent reduce compliance risk and protect sensitive data. The Next Best Action agent recommends what to do next. All governed, opt-in, and human-approved.



Find and Reuse the Right, Approved Content Instantly

For teams responsible for customer communications and compliance-heavy work, finding the right, approved content at the right moment is critical. A loan servicing manager may need 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. **Intelligent Search** lets teams find approved templates and assets instantly using natural language, and **Intelligent Archive Search** retrieves archived communications by meaning rather than exact file names, so the right content is always one prompt away, whether it lives in your library or your archive.

WHY IT MATTERS

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

PICTURE THIS

A loan servicing manager finds the most recent repayment notice template in seconds, and later retrieves an archived notice by describing it rather than hunting for a file name, sending the right message in under a minute every time.



Keep Every Communication Clear, On-Brand, and Compliant

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. The **Sentiment Analysis Agent** reviews communications for harsh, unclear, or off-brand language before they are delivered, and suggests improvements, so every message sounds professional, empathetic, and on-brand.

WHY IT MATTERS

- ✓ **Improves trust:** communications stay professional, empathetic, and aligned with brand values.
- ✓ **Reduces compliance risk:** flags language that may cause regulatory or reputational harm.
- ✓ **Drives consistency:** the same tone across every channel and team.

PICTURE THIS

An insurer prevents policy update letters from sounding overly technical or dismissive. AI highlights unclear phrasing and suggests improvements so messages stay customer-friendly and compliant before they go out.



Create On-Brand Content in Minutes, Not Weeks

Starting a new communication should not mean starting from a blank page or waiting on specialized technical resources. The **Communications Builder Agent** in EngageOne™ RapidCX generates a ready-to-review communication template from a plain-language prompt, built on your organization's already-approved content and automatically aligned to brand and governance rules, in any language. Teams go from idea to on-brand draft quickly, and a person reviews and approves every result before it is used.

WHY IT MATTERS

- ✓ **Speeds creation:** from idea to an on-brand draft in minutes.
- ✓ **Reduces dependency:** business teams create without starting from scratch or waiting on specialists.
- ✓ **Stays on-brand and compliant:** drafts are built on approved content and reviewed by a person.

PICTURE THIS

A servicing team needs a new payment-reminder template. They describe it in a sentence, AI drafts an on-brand version from approved content in any language, a reviewer approves it, and it is ready the same day.



Turn Complex Language into Clear Customer Communications

Regulated communications can overwhelm customers with dense or confusing language. The **Readability Agent** evaluates clarity against plain-language and regulatory readability standards and recommends specific edits, so obligations and next steps are easy to understand.

WHY IT MATTERS

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

PICTURE THIS

A credit card issuer runs adverse action notices through the readability check. An AI agent flags long sentences and jargon, proposes simpler phrasing, and confirms the final notice meets the target grade level before it goes out.



Update and Modernize Content with Confidence

Policies and standards change frequently, and teams are often forced to rewrite large volumes of content by hand, which is slow, costly, and inconsistent. The **Contextual Rewrite Agent** updates content on demand to align with current regulations and brand voice, and can simplify complex language for clarity, while preserving required statements. Teams review and approve every change.

WHY IT MATTERS

- ✓ **Speeds updates:** large-scale content revisions made across template libraries, on demand.
- ✓ **Maintains consistency:** messaging aligns with the latest regulatory and brand guidelines.
- ✓ **Empowers teams:** non-technical users modernize content without starting from scratch.

PICTURE THIS

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



Catch Compliance Risk Before Communications Go Out

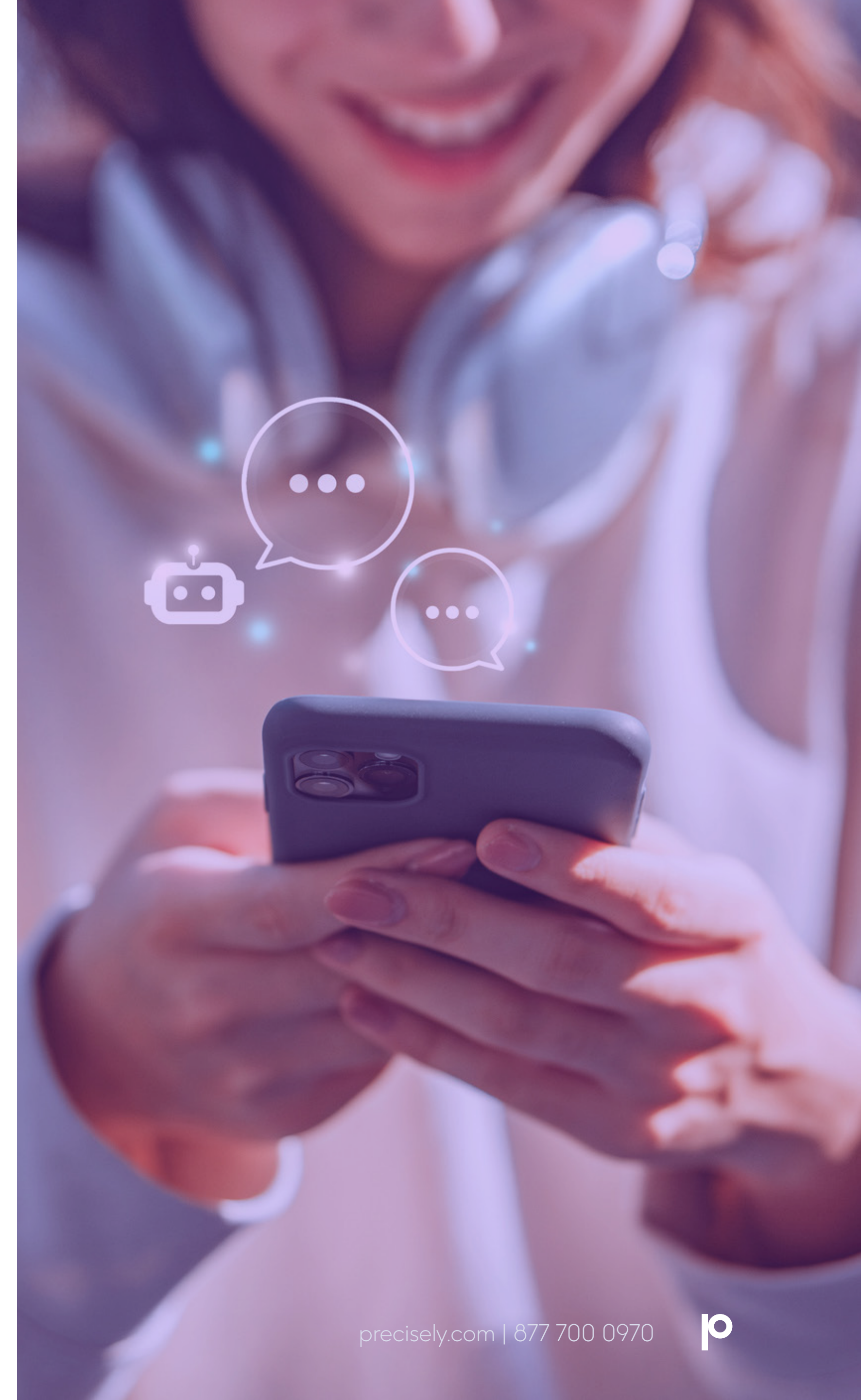
Compliance review is a manual bottleneck. Reviewers catch some issues and miss others, and when a problem surfaces after distribution, gaps in the audit trail make it hard to explain what happened. The **Compliance Risk Scoring Agent** adds an assistive, explainable check before distribution, reviewing communications against your configurable standards, flagging potential issues with clear explanations, and keeping an audit-ready record. Every AI flag goes to a human reviewer. The compliance decision stays yours.

WHY IT MATTERS

- ✓ **Reduces risk:** potential issues are caught before communications reach customers.
- ✓ **Audit-ready:** a complete record of what AI flagged and how it was resolved.
- ✓ **Keeps people in control:** assistive and explainable, with human reviewers making the final call.

PICTURE THIS

Before a rate-change notice is distributed, AI flags a missing required disclosure and explains why. The compliance team resolves it in minutes, with the check logged for audit.



Protect Sensitive Customer Data in Real Time

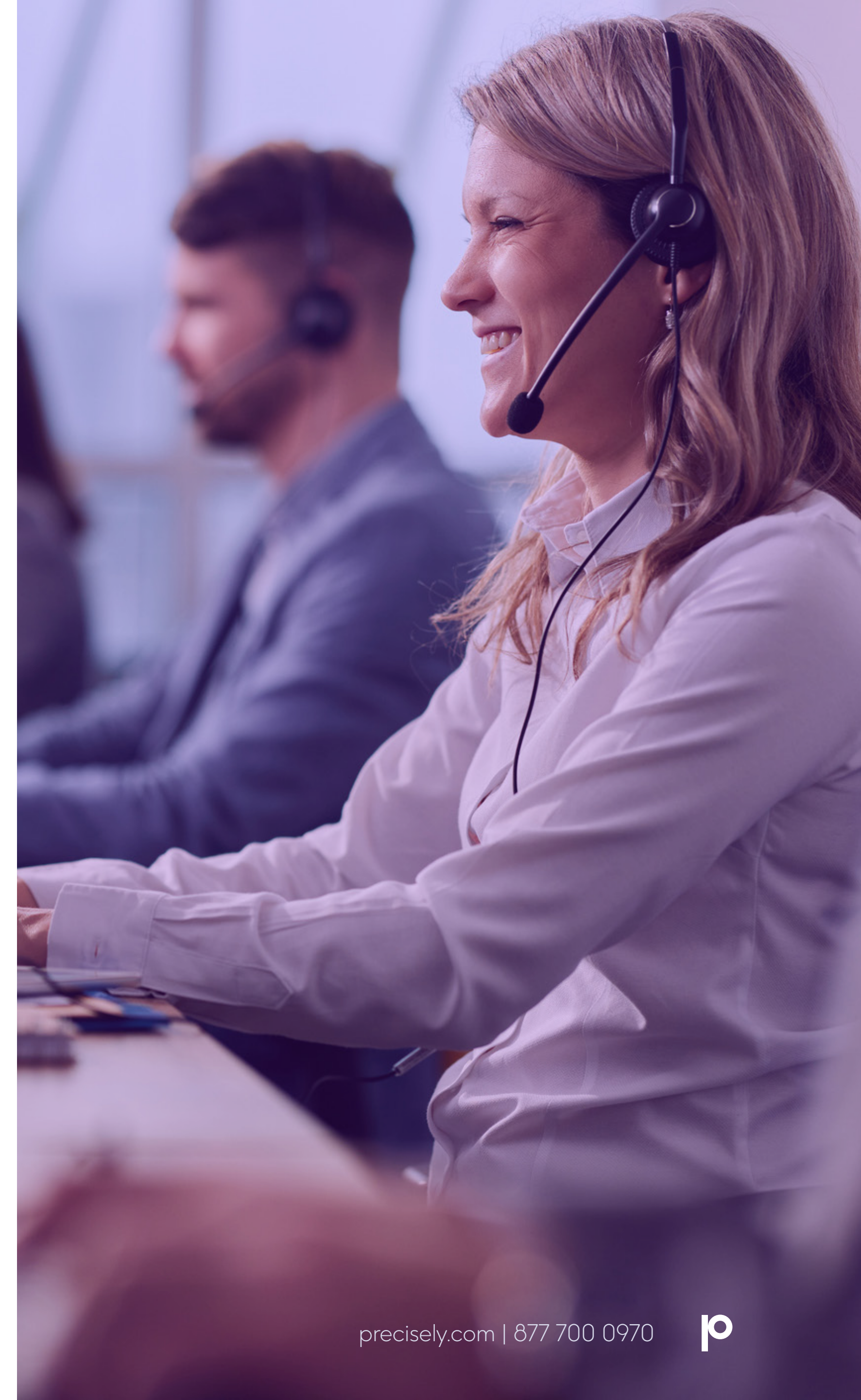
Sensitive customer data can slip into on-demand and interactive communications before anyone catches it, especially in fast-moving service interactions. The **PII Masking Insight Agent** detects and masks Personally Identifiable Information (PII) in real time as it is added, prompting the representative to resolve it before the communication is sent. This helps prevent accidental exposure while keeping the person fully in control.

WHY IT MATTERS

- ✓ **Protects customers:** prevents accidental exposure of sensitive data.
- ✓ **Reduces risk:** lowers compliance and reputational exposure.
- ✓ **Works in the moment:** Operates in real time during live interactions, with the representative in control.

PICTURE THIS

A service representative drafting a response inadvertently includes a full account number. AI flags and masks it in real time and prompts the representative, preventing exposure before the message is sent.



Turn Communication Insight into the Next Best Action

Knowing what happened across your communications is only half the picture; teams also need to know what to do next. The **Next Best Action Agent** analyzes communication performance and customer signals to recommend the most effective next action, helping teams improve engagement and outcomes. Recommendations start where they add the most value and extend across channels and workflows over time, and teams always choose whether to act.

WHY IT MATTERS

- ✓ **Increases outcomes:** directs effort toward the actions most likely to improve engagement.
- ✓ **Focuses teams:** surfaces the highest-impact next step instead of guesswork.
- ✓ **Keeps teams in control:** recommends, never acts on its own; transparent and auditable.

PICTURE THIS

After a billing campaign, AI highlights which follow-up message and channel are most likely to prompt on-time payment for a given segment. The team reviews the recommendation and applies it.



Connect Any AI Agent Into Your Communications Workflows

AI tools are most valuable when they can act on real-time communications data. EngageOne™ RapidCX supports **Model Context Protocol (MCP)**, giving AI agents direct access to customer communications workflows. This includes triggering communications, viewing communications, and inspecting customer engagement activity, with every request scoped to the user and recorded in an audit log, so AI connectivity meets the governance standards regulated industries require.

WHY IT MATTERS

- ✓ **Extends AI without custom integration:** MCP-compatible agents connect directly to RapidCX workflows without bespoke development work.
- ✓ **Governance stays intact:** Every request is user-scoped and audit logged, keeping connectivity compliant with regulated industry requirements.
- ✓ **Works with your existing AI stack:** Any MCP-compatible tool can connect to EngageOne™ RapidCX, so teams extend existing investments rather than replacing them.

PICTURE THIS

A contact center agent handles an inbound call about a disputed notice. Via MCP, their AI assistant pulls the customer's full communication history, identifies the notice in question, and triggers a corrected communication — all within the existing workflow, with every action logged and a complete audit trail ready if it needs to go further.





Your AI FAQs Answered:

Q1: How does governed AI reduce compliance risk?

It helps teams use only current, approved content, checks communications against your standards before distribution, and keeps an audit-ready record, while reviewers make the final decision.

Q2: Does AI replace people?

No. The agents are assistive and opt-in. A person reviews and approves every result, and full audit trails record how AI contributed.

Q3: What keeps AI accurate and on-brand?

Agents work from your approved content and governance rules, and EngageOne™ RapidCX grounds communications in trusted data, so outputs stay consistent and reliable.

Q4: How do the agents work together?

They span the lifecycle, finding and creating content, keeping it clear and compliant, protecting sensitive data, and recommending the next best action, all under the same governed model in EngageOne™ RapidCX.

Q5: How will the agent set grow?

Precisely continues to expand its governed AI agents across the communication lifecycle, so capabilities deepen over time without changing the governed, human-in-control model.

Trusted AI for Regulated Customer Communications

The future of customer communications in regulated industries will be smarter, faster, and safer with governed AI that augments existing policies and processes rather than replacing human judgment.

Precisely continues to expand EngageOne™ RapidCX governed AI agents across the communication lifecycle, all built on Value, Control, and Trust, so leaders can modernize communications knowing their AI is explainable, reliable, and built for the realities of regulated industries.

Begin your smarter, safer AI journey



About Precisely

Precisely is a leader in unified data management, delivering the AI-ready data that enterprises need to scale AI with confidence. The Precisely Platform brings a broad set of data management capabilities together on a single metadata and semantic foundation: connecting data integration, quality, governance, location intelligence, master data management, and customer communications. The Platform also features built-in data enrichment and works across the full data estate, including traditional business systems, modern cloud platforms, and the AI systems layered on top. This enables organizations to manage data where it lives rather than requiring migration to a single data ecosystem. More than 12,000 organizations in over 100 countries, including 92% of the Fortune 500, rely on Precisely. Learn more at www.precisely.com.

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