



CASE STUDY

Investment Analysts Notes Library Query Automation

AI Transformation Director

Analysts' notes scattered in various internal formats, senior partner sought a unified querying solution, aimed to extract statistics without external uploads, desired outcome was streamlined data access, enhancing efficiency in retrieving company insights, ensuring secure and comprehensive data analysis.

CHALLENGES

- Diverse formats hinder effective data querying.
- Unstructured notes complicate information retrieval.
- Lack of standardisation affects data accessibility.
- Fragmented data storage leads to inefficiencies.
- Manual processes slow down data processing.

STRATEGIC RESPONSE

- Custom libraries enhanced data processing.
- Generative AI improved data querying accuracy.
- Sourced citations ensured output reliability.
- AI integration reduced data hallucination.
- Platform customisation optimised performance.
- Accuracy improvements boosted trust in results.
- Reliable outputs supported informed decisions.

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 casestudy@orchestrato.com

RESULT



Significant processing time saving from **Days** to **Minutes**



Not disclosed

CONCLUSION

- Streamlined a critical workflow for efficiency.
- Reduced time required for task completion.
- Addressed previously neglected processes.
- Improved operational efficiency significantly.
- Enhanced productivity through automation.
- Minimised manual efforts in daily tasks.
- Delivered measurable business improvements.

Case Study Reference - **4123**

