

Intelligent Document Processing Solution Accelerator

Financial Services and Insurance industries

Intelligent document processing is on the rise

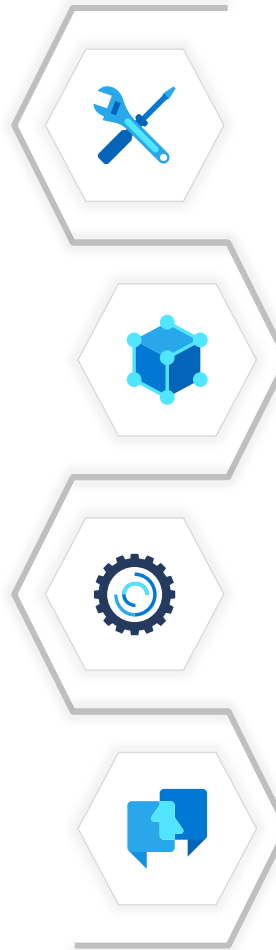
Incorporating AI is a high priority for financial institutions, and adoption is challenging

Growing global demand

\$4.1B is the projected size of the global intelligent document processing market by 2027.¹

Prioritizing process automation

56% of financial service leaders believe the most impactful use of AI over the next two years will be in process automation.²



Harnessing unstructured data

80% of worldwide data will be unstructured by 2025.³

Facing AI adoption difficulties

84% of banking and capital market professionals say their organizations face more challenges adopting AI than other technologies.⁴

1) ["Global Intelligent Document Processing Market Research", KBV Research, July 2021.](#)

2) ["KPMG survey says: Financial services insiders are banking on AI". KPMG, 2020.](#)

3) ["Extracting insights from complex, unstructured big data," IBM, Nov. 19, 2020.](#)

4) ["2022 banking and capital markets outlook", Deloitte 2021.](#)

Challenges to processing documents at scale

High volumes of structured and unstructured data require labor-intensive management



Manual document processing is time-consuming and subject to human error.



Shifting regulatory requirements make compliance difficult to consistently track and maintain.



Siloed document data prevents robust data analytics for business insights.



Long search times with unfocused results make information hard to find.



Unstructured data and images are not searchable, making this information inaccessible for analysis.



Many organizations lack the technical expertise required to develop custom AI solutions.

Artificial intelligence and machine learning are reported to be the most difficult technical capabilities for financial institutions to acquire.

Automated document ingestion delivers efficiency and insights

Reduce operating costs and gain valuable analytics and insights



Eliminate costly and inefficient manual processing to quickly turn high volumes of documents into usable data.



Make information easy to search and readily available for informed decision making.



Identify business risks and opportunities by uncovering and exploring data patterns and relationships.



Protect PII by identifying and masking or redacting it.

Transform document processing with AI-powered technology

Streamline operations and extract the most value from your data

The Intelligent Document Processing Solution

Accelerator enables automated document ingestion at scale.

It provides a **machine learning model** trained to accurately recognize, extract, and route content from custom document types to downstream applications for rich analysis and visual presentation of reports and insights.



Reduce costs by replacing manual document processing with automated processing at scale.



Uncover hidden insights to identify new business risks and opportunities.



Enhance search capabilities with faster, more accurate results.



Protect customer information with automated PII redaction.

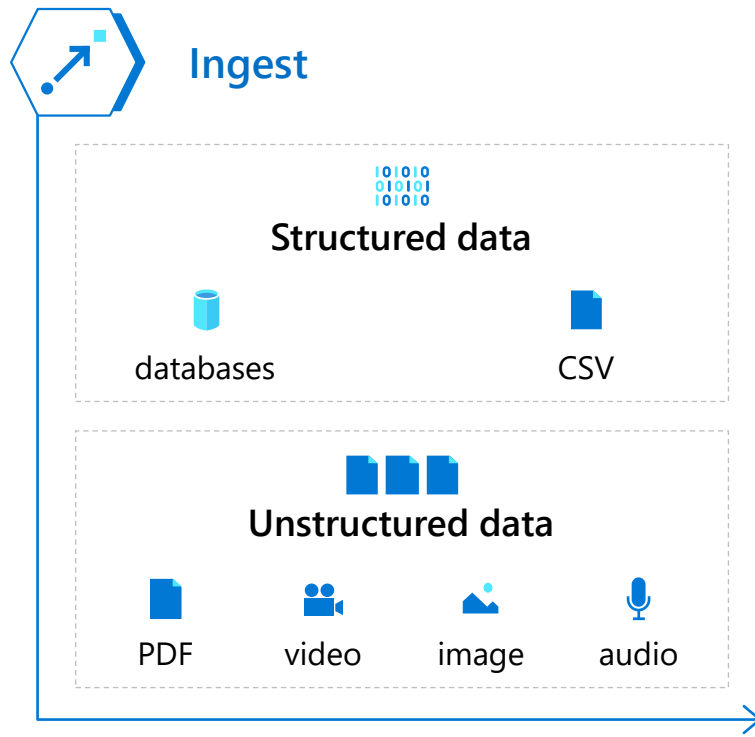


Minimize solution deployment time using pre-built, pre-configured IP from Microsoft.

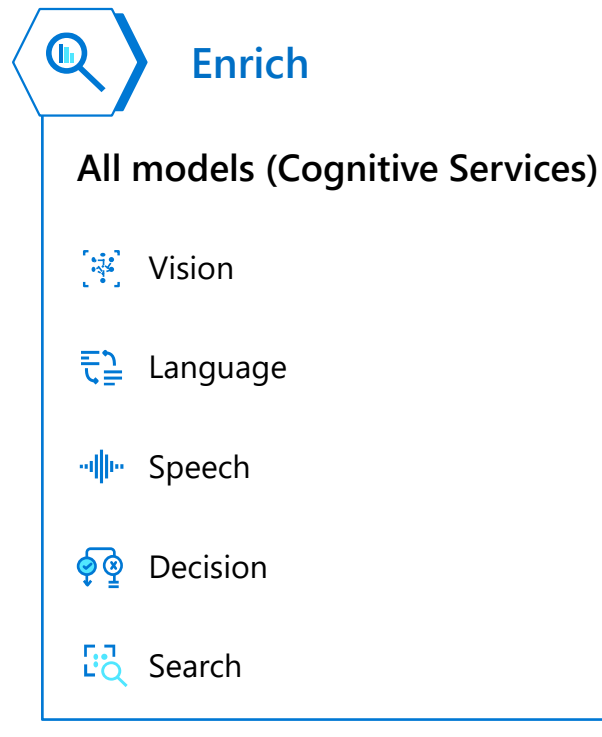
Automate data extraction and analysis with AI

Gain faster insights from diverse content types to uncover new risks and opportunities

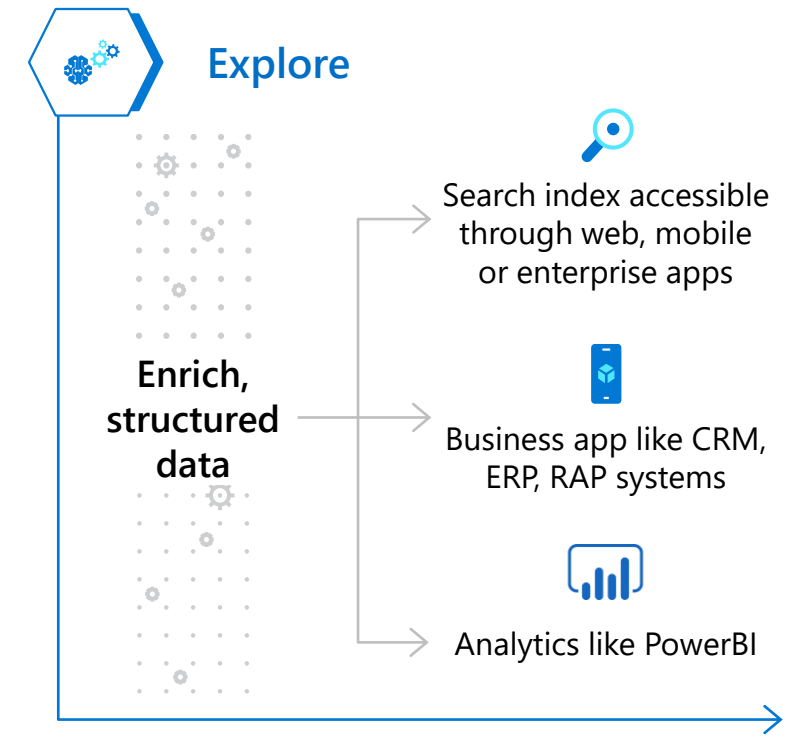
Step 1: Ingest content from a range of sources, using connectors to first and third-party data stores.



Step 2: Enrich the content with AI capabilities that let you extract information, find patterns, and deepen understanding.



Step 3: Explore the newly indexed data via search, bots, existing business applications, and data visualizations



Delivery of data to multiple downstream applications

Populate new and existing ERPs, workflows, visual BI dashboards, and more

The screenshot displays the Microsoft Azure Cognitive Search interface. On the left, there is a sidebar with a search bar, a 'View Entity Map' button, and a 'Key Phrases' section containing a list of entities with checkboxes. Below this are sections for 'Locations', 'Organizations', and 'Persons'. The main content area shows search results for the query 'Azure Search Pricing Table'. The results are organized into three sections: 'Azure Search Pricing Table', 'Cognitive Services and Bots (spanish)', and 'What is Azure Search service'. Each section contains a table of data. The 'Azure Search Pricing Table' section includes a table with columns for 'images', 'service', 'Max indexes', 'replicas', 'price', and 'partition'. The 'Cognitive Services and Bots (spanish)' section includes a table with columns for 'image', 'new MultiLanguageInput', 'O O', 'Procesamiento en', 'new MultiLanguageBatchInput', 'los vendedores en', 'Microsoft y sus', 'IA para', 'investigación y desarrollo par', 'campo y están', 'Azure y Cognitive', 'US MS', 'las', 'campo', 'una', 'cara', 'para', 'tema', 'tomar', 'valor', 'sus', 'día', 'Cognitive Services & Bots', 'Gerente Principal del Programa', 'CSI', 'Microsoft', 'Microsoft.com', 'NEW DATA', 'BRAINSHARK', 'Software', 'BI Bolt', 'Qué pasa', 'Conference Info Partners', 'Luis Cabrera', 'Cada', 'Jim Ninivaggi Vicepresidente', 'Mike Michaels Desarrollador d', 'John F. Kennedy', 'JFK', 'Fuente de', 'Escenarios de negocios de bot', 'Área', 'de Bot', and 'Dan Driscoll'. The 'What is Azure Search service' section includes a table with columns for 'Azure Search service - Azure S', 'proximity search', 'search apps', 'search index', 'fuzzy search', 'phrase search', 'Multi-lingual search', 'Geo-search Azure Search proces', 'Core search', 'search-based apps', 'rich search experience', 'a 99', 'tiers', 'diverse', 'centric', 'Azure Search service - Azure S', 'Azure Search', 'Azure', and 'Search'. On the right side of the interface, there is a video player showing a presentation by Satya Nadella titled 'Microsoft Linux'. Below the video player, there is a section for 'GitHub Facts' which includes a table of data.

Microsoft

Search...

Available Results: 20

View Entity Map

Key Phrases

- ☐ customers (4)
- ☐ resources (3)
- ☐ Azure SQL Database (2)
- ☐ Azure Search service (2)
- ☐ Azure portal (2)
- ☐ Contributors (2)
- ☐ HTML (2)
- ☐ JavaScript (2)
- ☐ Microsoft (2)
- ☐ Microsoft Corporation (2)

Locations

Organizations

Persons

Azure Search Pricing Table

images	service	Max indexes	replicas	price	partition
TB documents	hour	units	GB documents	high density1 mode	S2
MB	GB	GB 1	N/A	S3	Free
					Max
					max

Cognitive Services and Bots (spanish)

image	new MultiLanguageInput	O O	Procesamiento en
new MultiLanguageBatchInput	los vendedores en	Microsoft y sus	
IA para	investigación y desarrollo par	campo y están	Azure y Cognitive
US MS	las	campo	una
			cara
			para
			tema
			tomar
			valor
			sus
día	Cognitive Services & Bots	Gerente Principal del Programa	CSI
Microsoft	Microsoft.com	NEW DATA	BRAINSHARK
			Software
BI Bolt	Qué pasa	Conference Info Partners	Luis Cabrera
			Cada
Jim Ninivaggi Vicepresidente	Mike Michaels Desarrollador d		
John F. Kennedy	JFK	Fuente de	Escenarios de negocios de bot
			Área
de Bot	Dan Driscoll		

What is Azure Search service

Azure Search service - Azure S	proximity search	search apps
search index	fuzzy search	phrase search
		Multi-lingual search
Geo-search Azure Search proces	Core search	
search-based apps	rich search experience	a 99
		tiers
		diverse
centric	Azure Search service - Azure S	Azure Search
		Azure
		Search

GitHub Facts

GitHub Facts	GitHub Marketplace	use GitHub Enterprise
GitHub Enterprise Cloud	proven GitHub platform	GitHub Business Cloud
businesses	Electron framework	developer tools
		developer company
GitHub's hackable text editor	San Francisco	Amsterdam
Amsterdam, Netherlands	Boulder, CO	Tokyo
		Tokyo, Japan
		the U.S.
the Fortune	GitHub Facts	GitHub
		GitHub.com
		Company
		PJ Hyett
Boulder, CO	Sequoia Capital	Institutional Venture Partners
Institutional Venture Partners	Plans	GitHub Enterprise
		Chris Wanstrath

satyanadellalinux

Microsoft Linux

Example: Azure Cognitive Search powers a web app search engine

Standard Bank of South Africa automates due diligence

Situation



Standard Bank is Africa's largest bank by assets. When **manual due diligence in cross-border transactions** began absorbing too much of staff's time, the bank decided it needed a new way forward.

Solution



The bank partnered with Microsoft to bring an **automated, time-saving solution** to life. With Microsoft Azure Forms Recognizer, computer vision and API's, countless hours are set to be saved.

Impact



Now, the **registration process and document classification are instantaneous and totally automated**. A major portion of the required data are prepopulated into the banks systems ready for staff to validate.



"The instant payment registration has been the first benefit...because on the day we receive payment, it is in our system instantly."

But besides the quicker turnaround times, we have reduced the number of data elements to be captured by staff, increasing quality."

- Nico Swart
Head of Intelligent Automation
CIB Standard Bank of South Africa

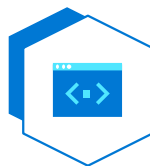
Accelerate your journey to Intelligent Document Processing



Kick-off

Learn more about the Intelligent Document Processing Solution Accelerator and view a demo.

30 minutes



Proof of value

Solution code walk-through and prototype creation for testing.

1-3 days



Proof of concept

Proof of concept (PoC) is built and deployed with support of the technical specialists and partners.

2-5 weeks

Quickly enable data ingestion, enrichment, and exploration

Achieve automated processing and rich knowledge mining at scale



Pre-configured automation services

Microsoft Logic Apps and Cognitive Search provide out-of-the-box service integrations to simplify and accelerate implementation.



Enable knowledge extraction wherever your data lives

With Azure Cognitive Services, Form Recognizer can be run on containers to accommodate multi-cloud and hybrid infrastructures.



Low code solution

The solution makes it easy for lines of business to deploy, test, and use these systems with minimal need for technical specialist support from IT.

Transform document processing with AI-powered technology

Streamline operations and extract the most value from your data

The Intelligent Document Processing Solution

Accelerator enables automated document ingestion at scale.

It provides a **machine learning model** trained to accurately recognize, extract, and route content from custom document types to downstream applications for rich analysis and visual presentation of reports and insights.



Reduce costs by replacing manual document processing with automated processing at scale.



Uncover hidden insights to identify new business risks and opportunities.



Enhance search capabilities with faster, more accurate results.

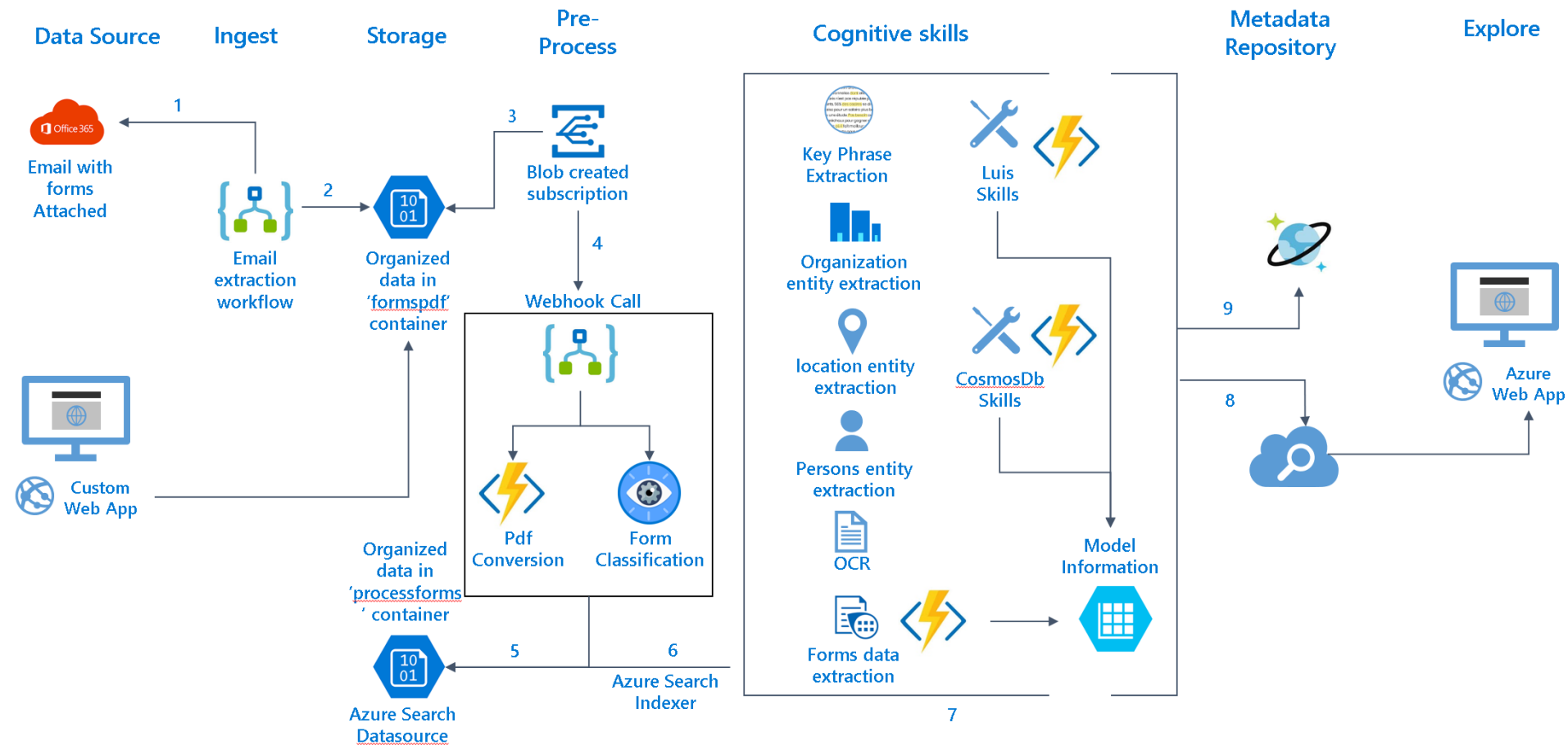


Protect customer information with automated PII redaction.



Minimize solution deployment time using pre-built, pre-configured IP from Microsoft.

Reference architecture



Delivery of data to multiple downstream applications

Populate new and existing ERPs, workflows, visual BI dashboards, and more

The screenshot displays the Microsoft Azure Cognitive Search interface. On the left, there is a sidebar with a search bar, a 'View Entity Map' button, and a 'Key Phrases' section containing a list of entities with checkboxes. Below this are sections for 'Locations', 'Organizations', and 'Persons'. The main content area shows search results for the query 'Azure Search Pricing Table'. The results are organized into three sections: 'Azure Search Pricing Table', 'Cognitive Services and Bots (spanish)', and 'What is Azure Search service'. Each section contains a table of data. The 'Azure Search Pricing Table' section includes a table with columns for 'images', 'service', 'Max indexes', 'replicas', 'price', and 'partition'. The 'Cognitive Services and Bots (spanish)' section includes a table with columns for 'image', 'new MultiLanguageInput', 'O O', and 'Procesamiento en'. The 'What is Azure Search service' section includes a table with columns for 'Azure Search service - Azure S', 'proximity search', and 'search apps'. On the right side of the interface, there is a video player showing a presentation by Satya Nadella with the title 'Microsoft Linux' and a 'satyanadellalinux' caption. Below the video player, there is a 'GitHub Facts' section with a table of data.

images	service	Max indexes	replicas	price	partition
TB documents	hour	units	GB documents	high density1 mode	S2
MB	GB	GB 1	N/A	S3	Free
					Max
					max

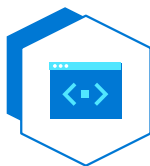
image	new MultiLanguageInput	O O	Procesamiento en
new MultiLanguageBatchInput	los vendedores en	Microsoft y sus	
IA para	investigación y desarrollo par	campo y están	Azure y Cognitive
US MS	las	campo	una
			cara
			para
			tema
			tomar
			valor
			sus
día	Cognitive Services & Bots	Gerente Principal del Programa	CSI
Microsoft	Microsoft.com	NEW DATA	BRAINSHARK
			Software
BI Bolt	Qué pasa	Conference Info Partners	Luis Cabrera
			Cada
Jim Ninivaggi	Vicepresidente	Mike Michaels	Desarrollador d
John F. Kennedy	JFK	Fuente de	Escenarios de negocios de bot
			Área
de Bot	Dan Driscoll		

Azure Search service - Azure S	proximity search	search apps
search index	fuzzy search	phrase search
		Multi-lingual search
Geo-search Azure Search proces	Core search	
search-based apps	rich search experience	a 99
		tiers
		diverse
centric	Azure Search service - Azure S	Azure Search
		Azure
		Search

GitHub Facts	GitHub Marketplace	use GitHub Enterprise
GitHub Enterprise Cloud	proven GitHub platform	GitHub Business Cloud
businesses	Electron framework	developer tools
		developer company
GitHub's hackable text editor	San Francisco	Amsterdam
Amsterdam, Netherlands	Boulder, CO	Tokyo
		Tokyo, Japan
		the U.S.
the Fortune	GitHub Facts	GitHub
		GitHub.com
		Company
		PJ Hyett
Boulder, CO	Sequoia Capital	Institutional Venture Partners
Institutional Venture Partners	Plans	GitHub Enterprise
		Chris Wanstrath

Example: Azure Cognitive Search powers a web app search engine

Next steps to Intelligent Document Processing POC



Prepare	Plan	Deploy
Confirm that the required Microsoft services are infosec approved to ensure compliance and security.	Define your business and technical requirements by testing the solution with a sample of your data and document your plan for Proof of Concept (POC).	Run and validate the POC solution with select data and make a plan to deploy at scale.
TBD	2-5 days	4-6 weeks

Thank you

