

 Take the Agentic leap with us

# Banking

With experience across 7+ leading banks in Nepal, we've built and deployed AI agents tailored to the unique operational, regulatory, and customer service needs of the banking sector.

Here, we highlight two impactful implementations  
**one focused on internal team support, and the other on customer success at scale.**

## The Challenge

### BANK A

#### Internal Automation at Scale

Client names have been withheld due to NDA agreements



100+ branches and over 1,500 employees

High dependency on central IT and compliance teams for repeated queries

Delays in SOP access, IT troubleshooting, and HR-related tasks

Overloaded support channels, leading to slow internal response times

## **BANK B**

### **Customer Interaction Bottlenecks**

Client names have been withheld due to NDA agreements.

250+ daily customer queries per branch (across 50+ branches)

Long wait times for basic service queries

Limited support bandwidth during peak hours

Missed opportunities for upselling or routing queries efficiently



# Our Solution

## BANK A

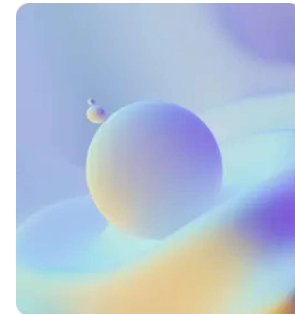
### Internal AI Agent (Employee-Facing)

Client names have been withheld due to NDA agreements

We deployed a secure, employee-facing AI agent trained on internal IT, compliance, HR, and operational SOPs.

## Key Capabilities

- ★ IT troubleshooting via chat
- ★ Real-time access to compliance guidelines and workflows



- ★ Leave policy queries, onboarding guides, and document access
- ★ Voice-enabled query handling for front-office staff
- ★ Internal dashboard with usage analytics and content management

## **BANK B**

### **Customer Success Agent**

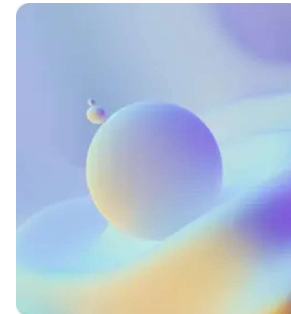
Client names have been withheld due to NDA agreements



To streamline external communication, we built a customer-facing conversational agent capable of handling high-volume inquiries across branches.

### Key Capabilities

- ★ Answered common banking queries (complaint registration, loan products, card services, etc.)
- ★ Tiered support system with escalation triggers
- ★ WhatsApp and web-based deployment
- ★ CRM integration for tracking lead and service tickets



★ Performance dashboard for  
team-level insights

# The Outcome

**BANK A**

Internal AI Agent

Client names have been withheld due to NDA agreements



Keys

**Results**

Handled **70%** of internal IT and compliance  
queries automatically

Reduced internal support load by over **60%**



The  
**Challenge**

Increased average **employee resolution speed**

Our  
**Solution**

**Improved internal knowledge** distribution and SOP access



Home

Services ▾

Company ▾

 [Book a Demo](#)



**BANK B**

**Customer Success Agent**

Client names have been withheld due to NDA agreements.



Keys



# Results

Successfully handled over **800 customer queries per day** through the AI agent, significantly reducing pressure on human staff

Automated responses to common service requests like account balance, loan details, card services, and branch hours

Provided consistent, real-time support across channels, including web and WhatsApp

Enabled 24/7 availability, improving customer satisfaction without increasing headcount





With our omnichannel platform, the bank's team managed all conversations, regardless of channel, through one unified backend, eliminating the need to switch platforms

## Looking to Scale Your Banking Operations?

**Let's build intelligent AI agents**  
tailored to your operations.

[Book a Demo](#)



Up Next

## Retail

A Europe-based wellness e-commerce company was scaling fast but struggling to keep up with customer demand.

## Take the leap with us



Schedule a Discovery Call



### Services

CX Agent

Internal Agent

Workflow  
Automation

### Company

About Us

Career

### Products

Banking

Retail

Insurance

Automotive

## Enterprise-Grade Security and Privacy

Security is at the core of everything we build. Palm Mind is ISO 27001 certified and GDPR compliant-trusted by businesses globally to build secure, privacy-first AI agents.



Legal

Education

Hospitality

## Get In Touch



[info@palmmind.com](mailto:info@palmmind.com)

### Contact Sales

Sydney, Australia

+61 424 399 166

Dubai, UAE

+971 56 451 5287

London, UK

+44 7810 641627

Seattle, USA

+1 8013102715

© Copyright 2025 Palm Mind Solution Pvt. Ltd

[Privacy Policy](#) [Terms & Conditions](#)

