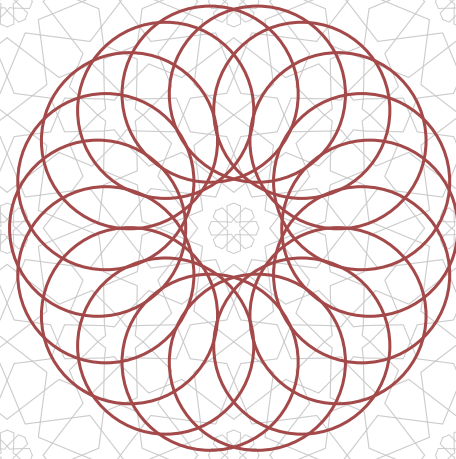


DOLPHIN DESIGN INTELLIGENCE

FOR BANKING AND FINANCE SECTOR



Dolphin FinTech One Platform. Infinite Possibilities.

Document Intelligence and Sustainability in the Banking Sector

Dolphin Development Team

Dolphin Intelligence Platform presents an innovative approach to managing, generating, and analyzing large volumes of **banking and financing documents** that include transactional records, agreements, regulatory compliance documents, and financial statements that are essential for both internal and external reporting, record-keeping, and legal enforcement. Dolphin FinTech solution transforms traditional document-heavy workflows into **intelligent, structured, and sustainable** processes, enabling individuals and businesses to invest, save, and grow through services that are powered by Design Intelligence and Intelligent Document Automation.

1 Introduction

Dolphin is a new paradigm in the digital transformation strategy for the banking and finance sector. It leverages artificial intelligence (AI), design intelligence (DI), intelligent document automation (IDA), and robotic process automation (RPA) technologies to streamline document-intensive processes. It is the optimal arbitrage for decision-making. It reduces human errors and optimises performance. It delivers the highest quality results while simultaneously being environmentally the most sustainable. It is an indispensable component of the sector's digital transformation strategy. It significantly reduces costs and improves customer experience by providing quicker and better financial services.

National and multinational retail banks, investment banks and financial services companies, manage banking relationships and product lines globally, serving billions of customers across multiple markets, processing big data and generating print-ready documents for millions of savings accounts, credit cards, mortgages, and loans. The banks manage millions to trillions of documents, from trade finance papers to personal account applications, and relies on advanced technology to process these more quickly and accurately than manual methods. Dolphin empowers banks to manage vast inflows of structured and unstructured data. By automating tasks such as data extraction, validation, storage, analysis, and **automated reporting**, banking and finance sector can significantly improve operational efficiency and enhance both security and the customer experience.

For banking and finance sector, Dolphin enables:

- Significant reduction in computing, storage, and backup costs
- Faster access to information through AI-powered search and analytics
- On-demand document generation that ensures compliance and brand consistency
- Tangible progress toward digital transformation, **sustainability and carbon reduction goals**

By moving away from static, low-resolution, high-size documents to dynamic, data-driven solutions, Dolphin FinTech solutions help the banking and finance sector unlock new operational efficiencies, actionable insights, and sustainability benefits across multiple departments.

2 Current Challenges

Documents in banking and finance serve critical purposes such as maintaining accurate financial records, proving identity, ensuring regulatory compliance, managing risk, and supporting decision-making for



both institutions and their clients. They provide a verifiable audit trail, detail the terms of financial products like loans, and help institutions make informed choices about resource allocation and risk management. The sector generate millions of documents every month—from customer statements and audit reports to loan letters and vendor invoices. In most cases, these documents are converted into static PDF files for compliance and long-term record-keeping.

While this approach is convenient and familiar, it creates several hidden inefficiencies that accumulate over time:

- **Redundant and Storage-Heavy Design:** Redundancy is a common problem in today's inefficient document workflows, where every record is saved in multiple places: structured databases (for transactions), as static PDF files on portal delivery (customer and compliance access), and as static PDF files (for archiving). This duplication increases data volumes, drives up costs, and complicates long-term management.
- **Limited Search and Visibility:** Once converted to PDFs, document content becomes difficult to query or analyze. Most systems support only basic metadata searches (e.g., invoice number, date, or customer ID). Extracting or analysing actual text within documents requires advanced OCR or Document AI tools — which are expensive and compute-intensive.
- **No Contextual or Cross-Document Insights:** Static PDFs are isolated documents that cannot link related information across multiple records, making it impossible to perform trend analysis, detect anomalies, or generate meaningful insights (e.g., identifying patterns in customer spending or branch performance).
- **Growing Sustainability Impact:** As document volumes multiply, the escalating need for storage, backup, and compute resources drives up operational costs and enlarges the carbon footprint, making traditional storage models unsustainable long-term.

3 Dolphin's Smart Document Solution

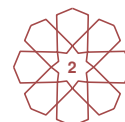
Dolphin directly addresses these challenges by replacing static document storage with a data-first, intelligent generation model. Instead of permanently saving every document as a PDF, Dolphin stores the essential data and smart template logic—creating a dynamic, reusable structure that can generate branded PDFs on demand whenever needed.

Key features include:

- Structured data + smart templates instead of static PDFs, eliminating redundant storage.
- On-demand document generation, reducing storage and compute requirements by over 80%.
- Intelligent search that works directly on document data — no OCR or external AI required.
- Contextual and cross-document analytics for faster, deeper insights.
- Secure integration with existing core banking, ERP, and CRM systems.
- Full compliance with audit and document retention policies.

4 Key Differentiators

- Data-first architecture: Documents remain live, intelligent, and reusable instead of being frozen.
- 80% reduction in redundant storage and corresponding drop in carbon footprint.
- Instant access to contextual insights without OCR or manual processing.
- Sustainability built-in: Lower data storage means lower energy use and carbon emissions.
- Enterprise scalability: Works seamlessly across all departments and document types.



5 Applicable Use Cases

Dolphin can be applied across multiple document automation processes, including:

- Customer bank statements
- Loan sanction letters and compliance documents
- Financial and operational reports
- Employee certificates, service awards, and letters
- Vendor invoices and payment receipts
- Annual reports, business plans, and detailed project reports

Each of these can be generated, searched, and analyzed dynamically while minimising storage load.

6 MVP and Pilot Roadmap

Dolphin has already developed a working Minimum Viable Product (MVP) demonstrating all the core functionalities of design intelligence (DI) and data-driven intelligent document automation (IDA). The MVP highlights automation of common document types such as brand identity (business cards and formal letters), certificates and awards, invoices and quotations, dashboards and infographics, and detailed project reports as the primary use cases. The MVP demonstrates how integrating structured and unstructured data with Dolphin's Smart Templates replaces low-resolution, large static PDFs with high-quality, optimally sized counterparts. This empowers users to instantly generate on-demand products that feature built-in security and intelligent search and validation by design.

This architecture and Dolphin's design logic are applicable across other high-volume document types, such as:

- Bank statements and transaction summaries
- Audit and compliance reports
- Certificates, letters, and acknowledgements
- Vendor invoices and payment confirmations
- Reports containing dynamically linked infographics

We propose a 12-week pilot program to demonstrate Dolphin's capabilities in a real banking context. This pilot will cover representative document types (e.g., compliance documents) and measure storage optimisation. The pilot will:

- Integrate Dolphin with live or anonymized banking and finance sector datasets
- Demonstrate document generation capabilities and storage optimisation
- Measure sustainability impact (targeting 80% reduction in document carbon footprint)
- Develop best practices, policy guidelines, and implementation roadmap for enterprise rollout

Key Deliverables

- Live demo integrated with real-world data samples orchestrating value propositions
- Comparative analysis of storage footprint before and after Dolphin integration
- Whitepaper on outcomes, policy recommendations, and deployment plan



7 About Us

7.1 Team Expertise and Intellectual Property

Our internationally acclaimed multidisciplinary team brings a wealth of experience and expertise in **graphic designing** (artworks, illustrations, visual identity and branding, marketing and advertising, user interfaces, packaging, print and publications), **data engineering** (building and maintaining the infrastructure for data collection, storage, processing, transformation, and modeling), **data science** (analysis, extracting insights, finding patterns, building predictive models, designing algorithms for optimisation, and deriving optimal control policies), **software engineering** (designing, developing, and maintaining software applications and systems), **information technology** (support, management, and maintenance), **project management**. At Dolphin, we pursue world-class research, innovation, and education in all these areas. Our contributions have been featured in leading scientific journals and are accessible on prominent open-source platforms, including [CTAN](#), [NPM](#), [PyPI](#), and [GitHub](#). Our collaborative efforts not only advance academic knowledge but also foster a vibrant community of practitioners and researchers. By engaging with industry partners and educational institutions, we aim to bridge the gap between theory and practice, ensuring that our work has a meaningful impact on skill development, wealth creation, and advancing society.

7.2 Our Mission

We empower businesses of all sizes to create professional, brand-consistent, and sustainable products with ease and speed.

8 Call for Action

We invite you to experience Dolphin Design and Document Intelligence in action. Partner with us as a sponsor or customer to unlock recurring revenue opportunities, accelerate your market growth, and become a leader in the field.

8.1 Contact Us to Get Started

To explore how our solution can benefit your organisation, we cordially invite you and your colleagues to schedule a demonstration. For a discussion on your specific requirements, please contact our team at info@bapfoundation.org.

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