

Finance Sector – India (Detailed Landing Page)

Executive Overview

India's financial services sector is operating under unprecedented pressure from regulatory mandates, customer expectations, and operational scale.

The Digital Personal Data Protection (DPDP) Act, enforced through the 2025 Rules, requires financial institutions to implement strong safeguards such as data masking, encryption, tokenization, access controls, audit trails, and breach readiness.

At the same time, customers expect seamless, personalized, and consistent engagement across channels, while operations teams struggle with high service volumes, legacy systems, and staffing gaps.

Talisma addresses these challenges through three independent but complementary AI-powered solution pillars: DPDP Compliance Automation, Customer 360 Intelligence, and Service & Operational Efficiency.

DPDP Compliance Automation – From Obligation to Operational Strength

The DPDP Act mandates financial institutions, as Data Fiduciaries, to ensure personal data is protected throughout its lifecycle—from collection to processing, storage, and deletion.

Manual or partially automated compliance approaches are expensive, slow, and expose institutions to regulatory and reputational risk.

Talisma's DPDP Compliance Automation solution uses AI to operationalize compliance across systems.

Key capabilities include automated masking and tokenization of personally identifiable information (PII), AI-driven access controls, continuous audit logging, secure backups, and breach-response readiness.

Compliance teams gain real-time visibility into data usage, access patterns, and risk indicators—ensuring continuous compliance rather than periodic checks.

Primary buyer personas include CIOs, CISOs, and COOs.

Customer 360 Intelligence – One Customer, One Truth

Customer data in financial institutions is typically fragmented across core banking systems, loan origination platforms, CRM tools, service desks, and digital channels.

This fragmentation prevents teams from understanding the complete customer journey, leading to disjointed experiences, missed revenue opportunities, and erosion of trust.

Talisma's Customer 360 Intelligence platform unifies customer data elements into a single, actionable view enriched with AI-driven insights.

For Customer Service teams, agents see full customer history including demographics, products, issues, sentiment, and interaction summaries.

For Sales and Relationship Management teams, AI predicts likelihood to purchase additional products, recommends cross-sell and up-sell opportunities, flags at-risk customers, and suggests next-best actions.

Decision-makers gain accurate intelligence to drive personalization, retention, and long-term customer value.

Primary buyer personas include VP Customer Service, VP Sales, VP Account Management, and COO.

Service & Operational Efficiency – AI That Works Alongside Your Teams

Financial institutions handle massive volumes of customer inquiries across email, voice, and chat channels.

Delays and inaccuracies often arise due to staffing constraints, complex regulations, training gaps, and reliance on legacy systems.

Talisma's AI-powered efficiency solutions bring intelligence directly into frontline operations.

Email Assist summarizes incoming emails, identifies sentiment, generates response drafts, and recommends next-best actions.

Voice Assist provides real-time guidance to agents during live calls, improving accuracy and reducing average handling time.

AI-driven Voice Bots and Chatbots handle routine inquiries autonomously, reducing call center load, eliminating wait times, and delivering consistent responses.

These capabilities improve service quality while reducing operational costs.

Primary buyer personas include VP Customer Service, CTO, and COO.

Business Impact & Outcomes

Financial institutions deploying Talisma's AI-powered solutions achieve faster DPDP compliance, improved regulatory confidence, enhanced customer trust, and measurable gains in service efficiency.

Organizations also see higher customer satisfaction, improved cross-sell and up-sell performance, reduced operational costs, and a scalable foundation for future growth.

Call to Action

Ready to elevate your compliance, customer intelligence, and operational efficiency?

Let's build your roadmap for AI-powered transformation in the financial sector.

→ Book a discovery call with our BFSI solutions team today.