

OpenText Aviator

Use case scenarios: Financial services



Financial services made simple



Why it's hard today

- High volume of documents, data, and client communications
- Manual, error-prone compliance reporting
- Inconsistent, slow responses to clients
- Difficulty surfacing insights from unstructured financial data
- High operational cost from repetitive tasks



Powered by OpenText

- OpenText™ Experience Aviator™
- OpenText™ Content Aviator™



Wins for everyone

- **Banking services:** improves regulatory readiness, trust, and operational efficiency.
- **Wealth management:** faster insights, smooth compliance, and strong client trust.
- **Insurance:** reduces claims friction, compliance risks, and customer churn.

The big payoffs

- ▶ **Elevated client experience**
On-demand insights and consistent accurate responses improve satisfaction and retention.
- ▶ **Reduced operational cost**
Automates manual, document-heavy workflows to cut processing time.
- ▶ **Secure data, trusted AI**
Built for regulated industries—ensuring data privacy and audit-ready compliance.

Let's get started...

Compliance and risk: Automate regulatory reporting, policy checks, and audit readiness.

Customer service and experience: Deliver faster, consistent answers across channels.

Information management: Securely automate docs and extract key data on-demand.

Marketing and communications: Personalize content at scale while ensuring regulatory compliance.

Operations and legal: Streamline contract review, investigation due diligence, and secure records management.

Explore Financial services scenarios



Simplify client communications with AI

I'm a wealth manager and when service disruptions hit, I need to keep clients calm and in the loop. With AI drafting, polishing tone, and tailoring quick updates, I deliver messages that are fast, clear, and empathetic. Less panic, more trust.

Let's go



Accelerate credit memo generation

I'm a mortgage underwriter, buried in stacks of loan docs. With AI spotting gaps, pulling out the key details, and drafting follow-ups in seconds, reviews fly by. Less paperwork, faster decisions, and happier borrowers.

Let's go



Draft empathetic, clear, and compliant communications

I'm a mortgage underwriter, and turning complex credit outcomes into clear client updates is my daily grind. With AI drafting, polishing tone, and smoothing approvals, I cut prep time, stay compliant, and deliver decisions clients actually understand. Faster and clearer.

Let's go



Accelerate automotive claims decisions

I'm a claims adjuster, and mountains of reports won't slow me down. With AI flagging gaps, firing off multilingual updates, and learning from past cases, I close claims faster, cut the grind, and keep customers smiling.

Let's go



Keep Salesforce in sync with claim updates

I'm a claims agent turning scattered documents into accurate Salesforce records. With AI summarizing workspaces, finding gaps, and auto-updating contacts, I resolve claims faster, reduce manual steps, and boost customer loyalty.

Let's go



Leverage AI-to-AI integration with Salesforce

I'm an insurance agent, and messy claim docs don't scare me. With AI surfacing totals, pinpointing causes, and auto-updating Salesforce, I ditch the data entry, boost accuracy, and process claims at record speed.

Let's go



Surface underwriting risks in seconds

I'm an underwriter using AI to turn stacks of inspection data into clear risk insights. With AI surfacing top hazards, catching discrepancies, and tracking mitigations, I cut review time, improve accuracy, and deliver faster underwriting decisions.

Let's go

Simplify client communications with AI

I'm a wealth manager preparing a service outage notification to keep customers well informed.

1 Draft it fast

Sample Prompt: "Draft a customer notification email that can be used in a wealth management services disruption."

Impact: First draft done—email ready for quick review.

2 Add the human touch

Sample Prompt: "Rewrite the email with more empathy."

Impact: Message reworked with a tone that connects.

3 Keep it concise

Sample Prompt: "Can you shorten this message and provide second version?"

Impact: Clear, concise options tailored, ready for any channel.

4 Stay ahead of the curve

Customers informed quickly, confidence maintained — OpenText Aviator automates empathetic, accurate client updates for Financial Services.

AI speeds incident response with rapid personalized customer communications.

Unlock the possibilities:

- **Faster response** - Escalate incidents in minutes, not hours.
- **Less manual work** - Automation cuts the repetitive tasks, freeing teams for what matters.
- **Consistent messaging** - Standardized updates keep every customer in the loop.
- **Scale ticket resolution** without adding headcount.

Accelerate credit memo generation

I'm a mortgage underwriter extracting relevant information from customer documents.

1 Gather what matters

Sample Prompt: "Extract all documents related to John Doe's mortgage application submitted last week."

Impact: All relevant files surfaced in one step.

2 Spot the gaps

Sample Prompt: "Show me the latest loan application forms with missing required documents."

Impact: Missing info flagged across every form.

3 Summarize the details

Sample Prompt: "Summarize key financial details (income, assets, liabilities) from the submitted mortgage package."

Impact: Critical financial data neatly summarized for review.

4 Draft the follow-up

Sample Prompt: "Draft an email with the missing information required from the application form."

Impact: Customer-ready email drafted in seconds.

5 Fast-track the process

Quicker reviews equal happier customers. Smarter document analysis reduces manual effort and accelerates underwriting decisions.

AI accelerates mortgage underwriting by reducing manual document work.

Unlock the possibilities:

- **Reduce manual doc handling** –By up to 80% with AI-driven automation.
- **Shorten underwriting review cycles** –Cut customer wait time by up to 40%.
- **Accelerate credit memo processing** –Generate summaries instantly, cuts cycle time from hours to minutes.
- **Improve operational efficiency** – Free staff from repetitive tasks.

Draft empathetic, clear, and compliant communications

I'm a mortgage underwriter relaying a credit decision, rationale, and next steps for clients.

1 Kick off the draft

Sample Prompt: "Draft a customer notification email summarizing the credit decision, rationale, and next steps."

Impact: Loan decision drafted—clear, friendly, and professional.

2 Add what's next

Sample Prompt: "Create a draft email explaining the loan denial and offer alternative financial products."

Impact: Customers walk away with options, not just a 'no.'

3 Polish the tone

Sample Prompt: "Can you shorten this message and provide second version in a more empathetic tone?"

Impact: Two ready-to-use drafts for review—concise and compassionate.

4 Streamline communications

Smarter drafting tools ensure consistent messaging and faster turnaround – OpenText Aviator delivers quick contextual messaging for stronger client experiences.

AI helps underwriters deliver clear, compliant credit communications faster.

Unlock the possibilities:

- **Ensure clear, consistent messages** – With AI-driven compliance and rationale.
- **Cut customer wait times** – Automated drafts lowers review cycles by up to 30%.
- **Reduce manual effort** – Saving an underwriter up to 70% of doc handling.
- **Boost productivity** – Streamline repetitive prep work.

Accelerate automotive claims decisions

I'm a claims adjuster gathering information to make the right claim decision.

1 Get the claim snapshot

Sample Prompt: "Summarize the current status of claim #CLM-45892 for policyholder M. Lopez."

Impact: Status pulled instantly—what's filed, what's missing, and what's next.

2 Spot the missing pieces

Sample Prompt: "List the documents still needed to close this claim."

Impact: Gaps quickly identified—police report and repair estimate flagged.

3 Speak customer's language

Sample Prompt: "Generate a message to the customer requesting these documents in Spanish."

Impact: Clear, multilingual message drafted in seconds.

4 Learn from past claims

Sample Prompt: "Show similar claims that were resolved quickly and how they were closed."

Impact: Proven playbooks surface—for best practices, faster closures, and smoother workflows.

5 Close it out clean

Sample Prompt: "Generate a closing checklist for this claim."

Impact: Checklist ready—everything reviewed, verified, and finalized.

6 Focus on what matters

By automating routine tasks, OpenText Aviator frees up adjusters to focus on customers — improving satisfaction and claims decision quality.

AI helps adjusters make faster, more accurate claim decisions.

Unlock the possibilities:

- **Better Customer Experience** – Multilingual, personalized updates boost clarity and satisfaction.
- **Higher Efficiency** –Automates checklists and summaries, reducing manual touchpoints per claim and time spent per claim.
- **Smarter Decisions** –Context-aware insights from past cases improve claim accuracy rate and consistency scores.

Keep Salesforce® in sync with claim updates

I'm a claims specialist using Agentforce® and OpenText Aviator to summarize and update information.

1 Recap claim workspace

Sample Prompt: "Please summarize the workspace for this claim."

Impact: Clear, bulleted overview of all claim docs surfaced instantly.

2 Capture expert conclusions

Sample Prompt: "What's the conclusion of the expert opinions?"

Impact: Key findings summarized with supporting links for further investigation.

3 Find and fill gaps

Sample Prompt: "Do any of the documents include the contact info for the roofing inspector?"

Impact: Contact info located across the documentation content.

4 Check the contacts

Sample Prompt: "Do we already have a contact record for John Thompson? If not, please create a new contact record and open the contact card for me."

Impact: Duplicate check done within Salesforce—contact is created if missing.

5 Draft tailored outreach

Sample Prompt: "Draft and send an email to John Thompson inquiring about the methodology they used for creating the expert opinion."

Impact: Customized email generated—ready to review and send.

6 Keep everything synced

OpenText Aviator keeps documents and Salesforce claims accurate and records up to date - speeding claims resolution and happier customers.

Seamlessly sync Salesforce claim information with powerful AI-to-AI doc insights.

Unlock the possibilities:

- **Accurate records** –AI auto-summarizes claim details and updates Salesforce, improving claim accuracy.
- **Seamless processing** –Automated updates cut manual touchpoints per claim and shorten time spent per claim.
- **Faster resolution** – Streamlined workflows reduce average claim cycle.
- **Higher satisfaction** –Timely updates boost customer satisfaction.

Leverage AI-to-AI integration with Salesforce®

I'm a claims specialist using Agentforce® and OpenText Aviator to highlight details across documents.

1 Nail down the numbers

Sample Prompt: "Determine from the workspace the total damage value for the claim."

Impact: Clear dollar amount surfaced—e.g. the total damage value for the claim is \$15,300.

2 Pinpoint the cause

Sample Prompt: "Identify who is responsible for the damage and the cause from the multiple reports and documentation?"

Impact: Responsibility and cause summarized in one view.

3 Update without delay

Sample Prompt: "Update the claim item amount with the total damage value."

Impact: The claim item amount has been successfully updated to \$15,300 in the system.

4 Jet-speed the process!

Fewer errors, faster claims handling, better service. With AI-driven summaries, claims specialists spend less time on manual entry and more time serving customers.

Leverage AI-to-AI integration between OpenText and Salesforce for max results.

Unlock the possibilities:

- **Eliminate manual data entry** – Auto-summarize docs and cut errors by up to 80%.
- **Ensure real-time accuracy** –Keep claims current and boost record accuracy up to 95%.
- **Increase processing efficiency** – Reduced time per claim.
- **Enhance customer experience** – With faster, more reliable claims handling.

Surface underwriting risks in seconds

I'm an underwriter using Guidewire™ to access all relevant information from customer docs.

1 Spot the top risks

Sample Prompt: "Summarize the top risks identified in the latest inspection report for Acme Manufacturing."

Impact: Across case document data, key risks are highlighted—fire, chemical storage, and safety issues flagged for urgent action.

3 Track mitigation efforts

Sample Prompt: "List any risk mitigation actions the client has taken in the last 12 months."

Impact: Safety upgrades summarized—fire drills, CCTV, and wiring fixes noted.

2 Catch the gotchas

Sample Prompt: "Are there any inconsistencies between the broker's submission and the property inspection report?"

Impact: Discrepancies are caught and surfaced—clear view before finalizing the risk assessment.

4 Accelerated underwriting!

AI accelerates underwriting by surfacing risk data instantly, reducing review time, improving evaluation accuracy, enabling consistent and compliant decisions.

Faster AI document reviews, partnered with Guidewire for better underwriting decisions.

Unlock the possibilities:

- **Make faster decisions** –Cut underwriting cycle time by up to 50% for quicker quotes.
- **Increase risk accuracy** – Improve valuing with up to 25% higher assessment accuracy.
- **Cut manual work** –Reduce document processing by up to 70%.



 **Limitless**