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# From Lead to Need



## AI Web Application for Commercial Banking Sales

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### Project Overview

#### Problem Statement

- 1) Sales team spends **countless manual hours reviewing financial statements** to identify leads and recommend products
  - 2) Representatives **lack understanding of Bangkok Bank's full product suite**, leading to missed sales opportunities
- Our objective is to **increase sales** by helping representatives acquire new customers and recommend personalized products



**Limited  
Capacity**

**Training  
Gaps**

#### Data



Hosted on Databricks



Scraped from Web



**3.8M**  
Transactions



**21K**  
Companies



Financial Statements



News

### Find and Qualify New Leads

#### Methods

Identify Lead



- Using internal data, find companies that transact most frequently with the Bank's existing customers

PowerBI Visual



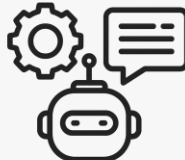
- Map supply chain network relationships
- Filter by time and industry

Set Criteria



- User defines qualification criteria (e.g., debt-to-equity ratio < 2)

AI Agent Qualifies Lead

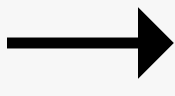


- **Inputs:** company name, and qualification criteria
- **Web search** tool calling
- **Output:** Pass / Fail + Reasoning and Sources

#### Results

**Fast and Accurate**

**5 Hours**  
Manual Research  
per Person



**5 Minutes**  
Automated  
Approach

**86.3%**  
Accuracy

*Custom Evaluation Set  
Human-in-the-loop*

### Recommend Personalized Products

#### Methods

AI Workflow

- **Inputs:** company name, uploaded documents
- **Output:** Up to 10 highly relevant Bangkok Bank Products
- **Workflow components:**
  - Deep Research on Company
  - Report on product offerings
  - Reasoning Model



#### Recommended Products

Download PDF

Thai

*In order of priority*

#### 1. CapEx Term Loan / Syndicated Loan (with optional Sustainability-Linked features)

Reasoning: Exotic Foods plans to add a new production line by late-2025 to lower unit costs and lift capacity (<https://www.kachooninternational.com/markets/554035>). A medium- to long-term Bangkok Bank Term Loan—arranged bilaterally or via a syndicated facility—will fund factory construction, machinery and fit-out costs while matching cash-flow with a grace period and sculpted amortization. A green or sustainability-linked structure can reward the company with pricing step-downs if it meets agreed ESG / energy-efficiency KPIs, dovetailing with global demand for sustainably produced food.



Good Recommendation



Bad Recommendation

#### Results

**300+**  
Runs

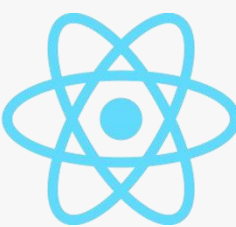
**> 80%**  
Thumbs Up Ratings

*"I didn't even know BizPromptPay was a product we had!"*  
– Sales Rep

*"[...] very useful and well-supported with clear reasons."*  
– Sales Rep

*"Your tool saves hours of preparation time...and helps me better serve my 10+ clients."*  
– Sales Rep

#### Tech Stack



### Business Impact



**500**

Hours Saved / Month



**100+**

Users



**\$2M**

Estimated Revenue Earnings



**\$20M**

Estimated Revenue Earnings

**Summer 2025**

Sandbox Environment

**End of 2025**

Development Environment

**Start of 2026**

Production Environment

- Small-scale pilot testing at a few business centers
- Uses strictly public data for recommendations

- Onboard additional business centers
- Obtain Change Advisory Board approval for production rollout

- Full-scale deployment
- Can integrate with internal systems
  - Enlite, SharePoint, Azure Data Lake