From Lead to Need

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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

3.8M Transactions

21K Companies

Scraped from Web

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

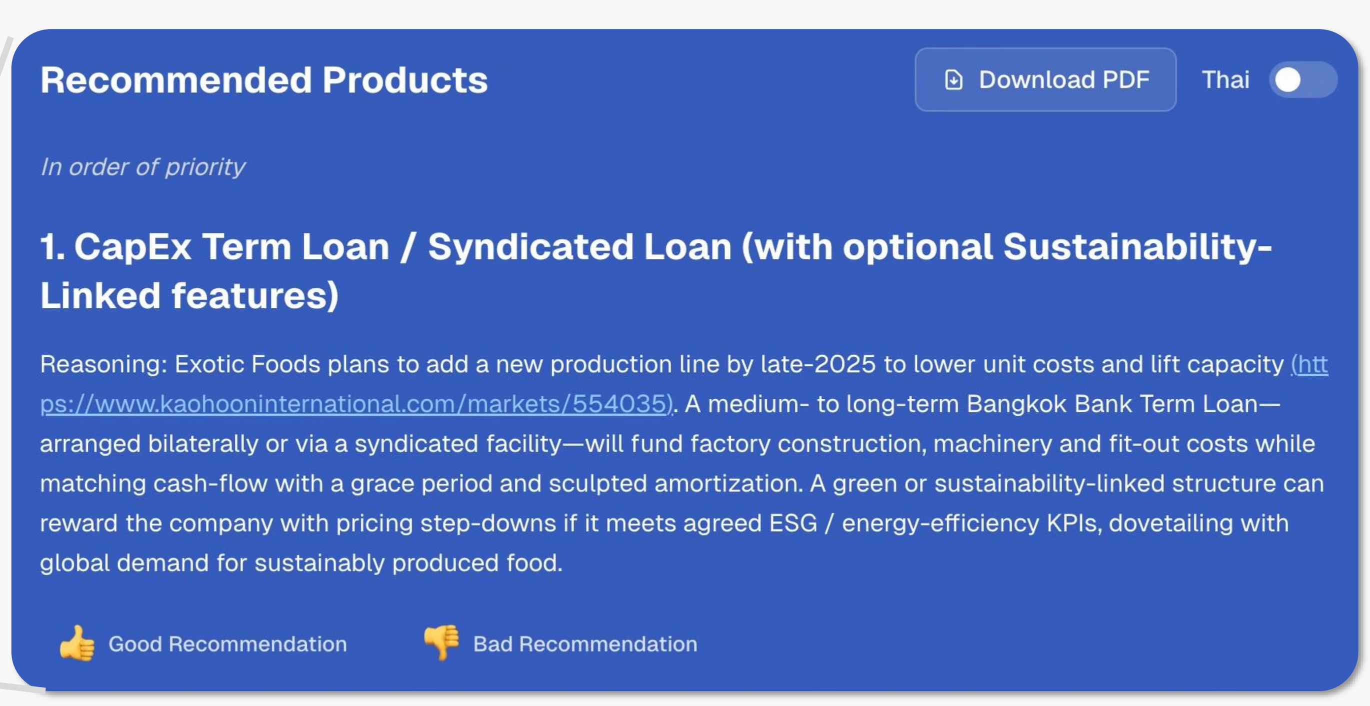
Human-in-the-loop

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



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

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

End of 2025

Development Environment

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

Start of 2026

Production Environment

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