



# Accelerating Financial Document Access with AI-Powered Retrieval

## Challenge

A Fortune 500 company providing audit, consulting, advisory, and tax services faced mounting challenges in managing and accessing vast volumes of financial data and documents.

With thousands of reports, legal records, and financial statements generated and stored daily, employees often struggled to locate critical information quickly. This led to significant time loss, reduced productivity, and delays in responding to client needs, impacting both efficiency and service quality.

## Solution

INSPYR Solutions was selected to implement an AI-powered solution designed to streamline document indexing, retrieval, and access across the global organization.

The approach was developed in several phases:

- **Assessment and Planning:** INSPYR Solutions conducted a thorough analysis of document types and identified critical areas where rapid, efficient access was most needed.
- **Creating and Training Intelligent Agents:** Our experts developed retrieval-augmented generation (RAG) and large language model (LLM) agents trained with company-specific data to manage and retrieve documents. The team also designed GPT models to automatically index repositories using natural language processing.
- **Technological Implementation:** INSPYR Solutions then integrated GPTs and RAG agents with existing document management systems

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and databases and deployed cloud-based solutions for scalability and global accessibility.

- **Training and Support:** INSPYR Solutions conducted workshops and online training to upskill employees, supported by a dedicated team to ensure smooth adoption and process optimization.

## Outcome

The AI-driven solution and related education achieved significant operational improvements:

- **Productivity:** Increased efficiency by 20% in repetitive document-related tasks, enabling staff to focus on higher-value activities.
- **Speed:** Reduced document search times from minutes to seconds, improving decision-making and responsiveness.

- **Collaboration:** Improved indexing and retrieval enhanced communication and coordination across global offices.
- **Scalability:** Established a robust infrastructure capable of adapting to future technological innovations.

## Client Profile

The client is an international Fortune 500 company with more than 415,000 employees that provides audit, tax, consulting, and advisory services worldwide.

## Technologies Supported

Generative AI (GPT), large language models (LLMs), Microsoft Azure AI Services, retrieval-augmented generation (RAG)

## About INSPYR Solutions

Technology is our focus and quality is our commitment. As a leading expert in delivering flexible technology and talent solutions, we strategically align industry and technical expertise with our clients' business objectives and cultural needs. Our tailored offerings include a wide variety of professional services, project solutions, managed services, and talent resources, all bolstered by our strategic partnerships with cutting-edge technology services. By always striving for excellence and focusing on the human aspect of our business, we work seamlessly with our talent and clients to match the right solutions to the right opportunities. Learn more about us at [www.inspyrsolutions.com](http://www.inspyrsolutions.com).