



EMMA Finance: Closing the Gap Between Knowledge and Execution

An AI-driven access layer for Global Financial Services.

The Foundation of Global Financial Services is Strong

1,000+

**Standard Operating
Procedures (SOPs)**

500+

Instructional Videos

The organization has invested heavily in guidance. The content exists; it is structured, governed, and reliable. This documentation was built to support accurate and consistent execution across the enterprise.

The Challenge is Access During Execution

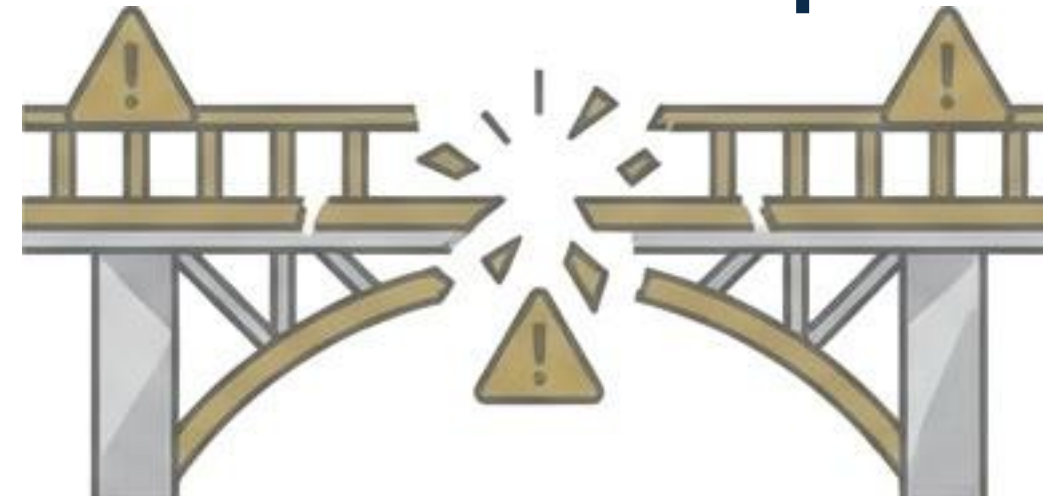
The Asset



Static Library of SOPs

The difficulty lies not in the quality of information, but in its **accessibility at the moment** work is being done.

The Knowledge-Execution Gap



The Reality



Real-time Pressure

Stopping execution to search, read, and interpret documentation is often unrealistic in a live workflow. This creates a **paradox**: the more guidance we create, **the harder it becomes to find it quickly**.

Inaccessible Knowledge Creates Operational Drag



Reality Check

When users can't find answers instantly, they default to asking colleagues creating a hidden tax on your most valuable talent.

- **Experts stop executing** to guide others.
- Lean teams are **stretched thinner**.
- **Risk of inconsistency** increases as oral tradition replaces written SOPs.

EMMA Finance: A New Access Layer for Existing Knowledge

An AI voice agent designed specifically to **support execution** for **Global Financial Services** teams.



Does not replace
Finance expertise

Does not
change SOPs

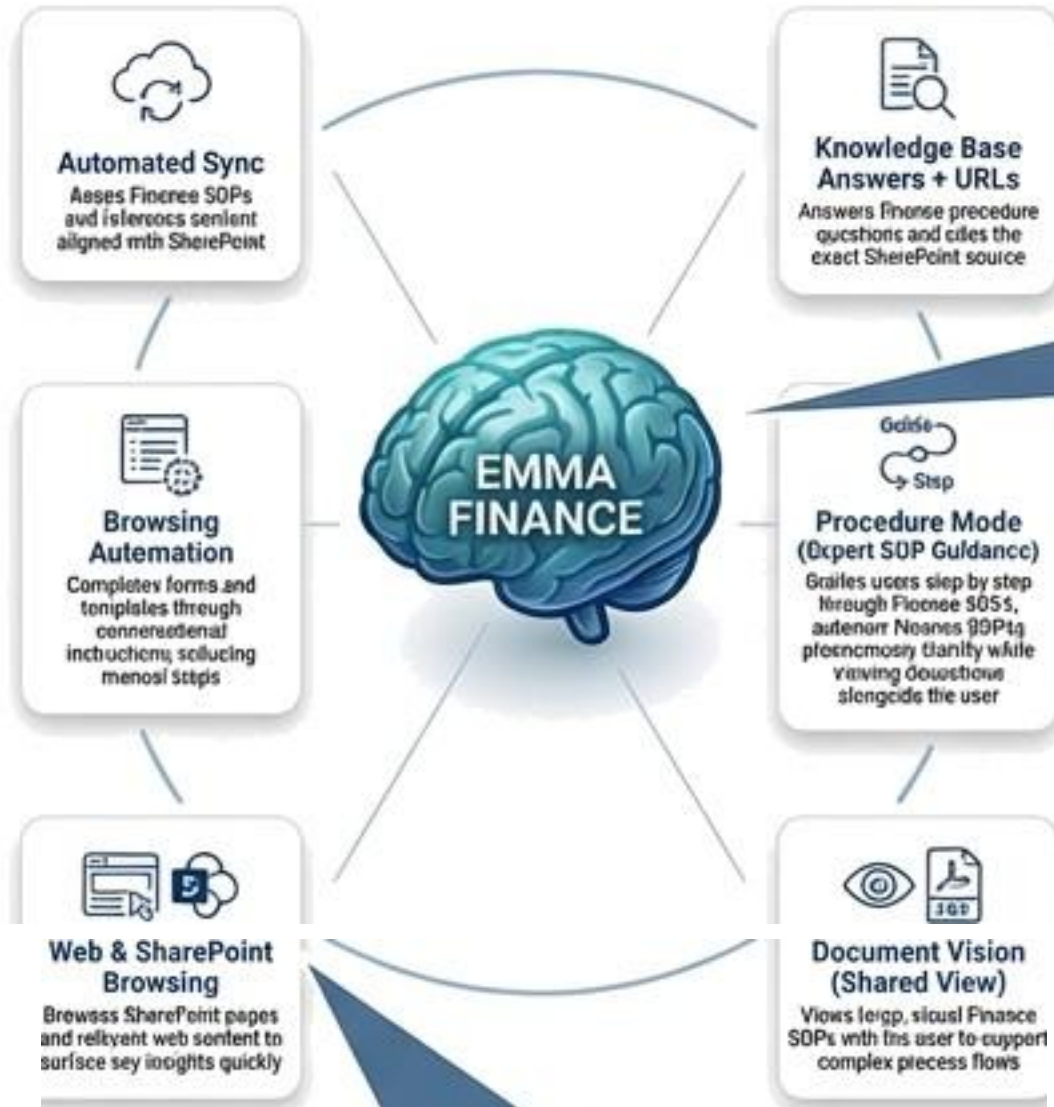
Does not
bypass controls

Emma connects the user to the knowledge that already exists, **bridging the gap** between the PDF on the server and the employee doing the work.

A Multimodal Intelligent Support Ecosystem

Multimodal:
Voice, Text, Vision

- Multimodal (Voice, Text, Vision)
- Multilingual
- Instant, Contextual Responses
- Personalized, Expert Guidance
- Supports Different Working Styles and Objectives



Instant Contextual Responses

Always aligned with SharePoint

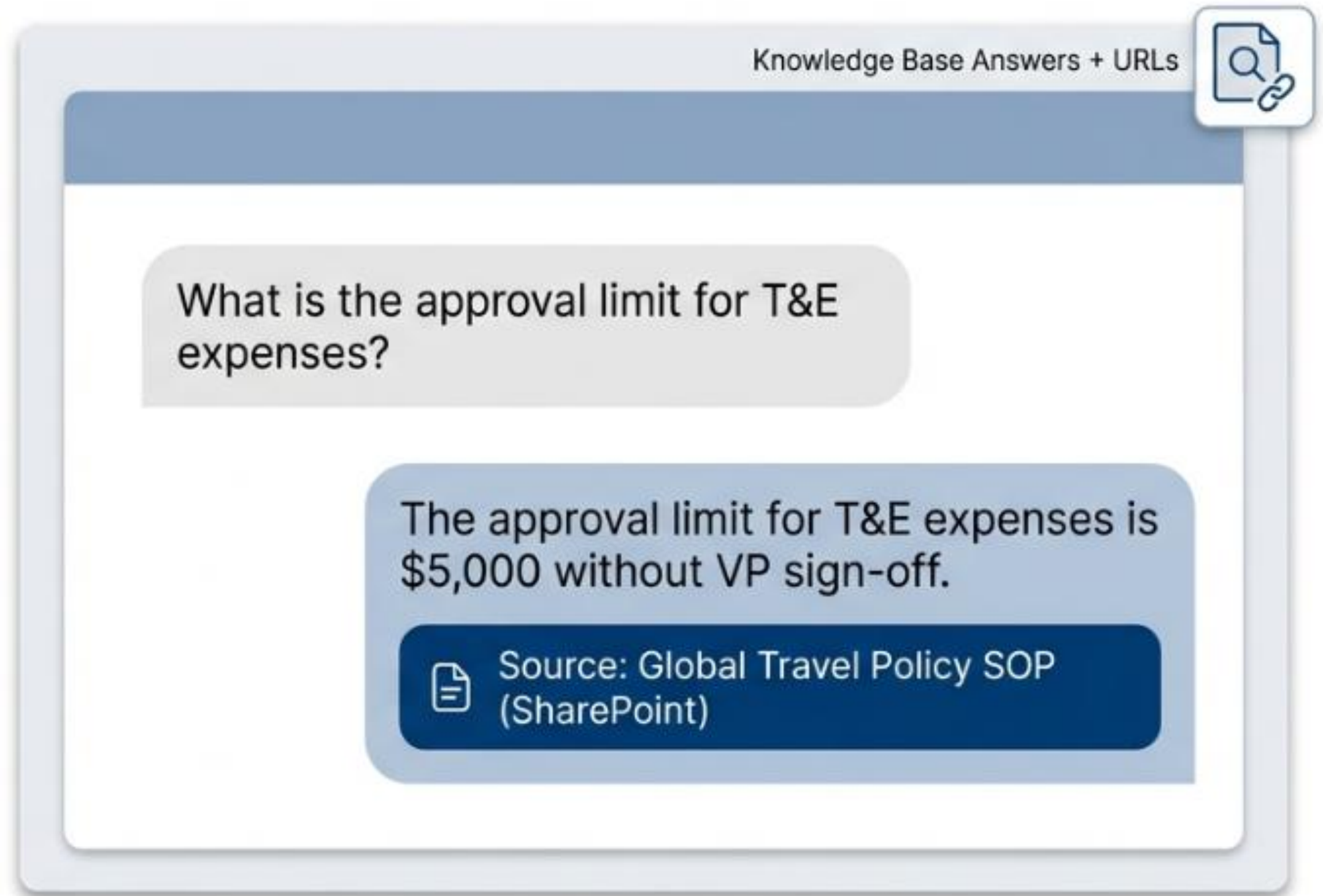
Basic Mode: Instant Answers with Citations

Use Case: Quick natural language questions.

Functionality:

- Emma queries the approved Knowledge Base.
- Returns clear, summarized answers.
- **Crucial:** Provides direct citation links to the SharePoint source.

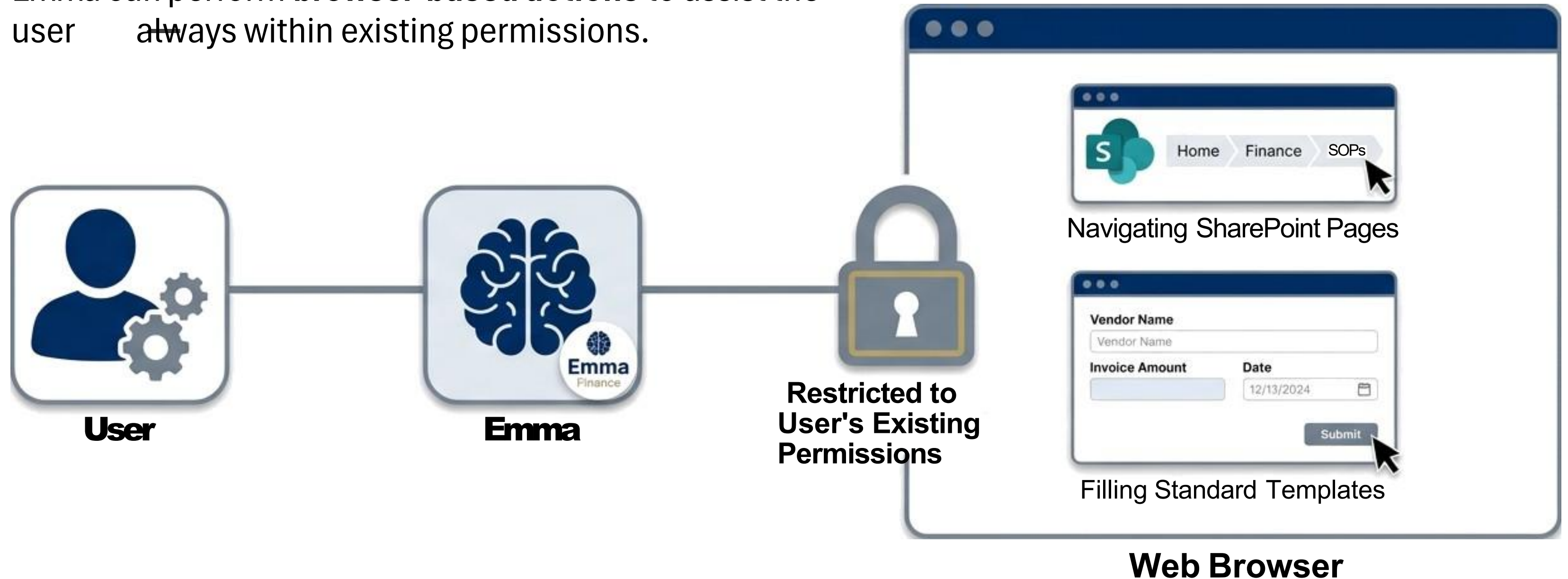
Benefit: Reduces search time and maintains trust.



The screenshot displays a user interface for a Knowledge Base. At the top right, it says "Knowledge Base Answers + URLs" next to a magnifying glass icon. The main content area shows a question in a light gray bubble: "What is the approval limit for T&E expenses?". Below it, a blue bubble contains the answer: "The approval limit for T&E expenses is \$5,000 without VP sign-off." At the bottom of the answer bubble, there is a dark blue button with a document icon and the text "Source: Global Travel Policy SOP (SharePoint)".

Reducing Manual Burden Through Automation

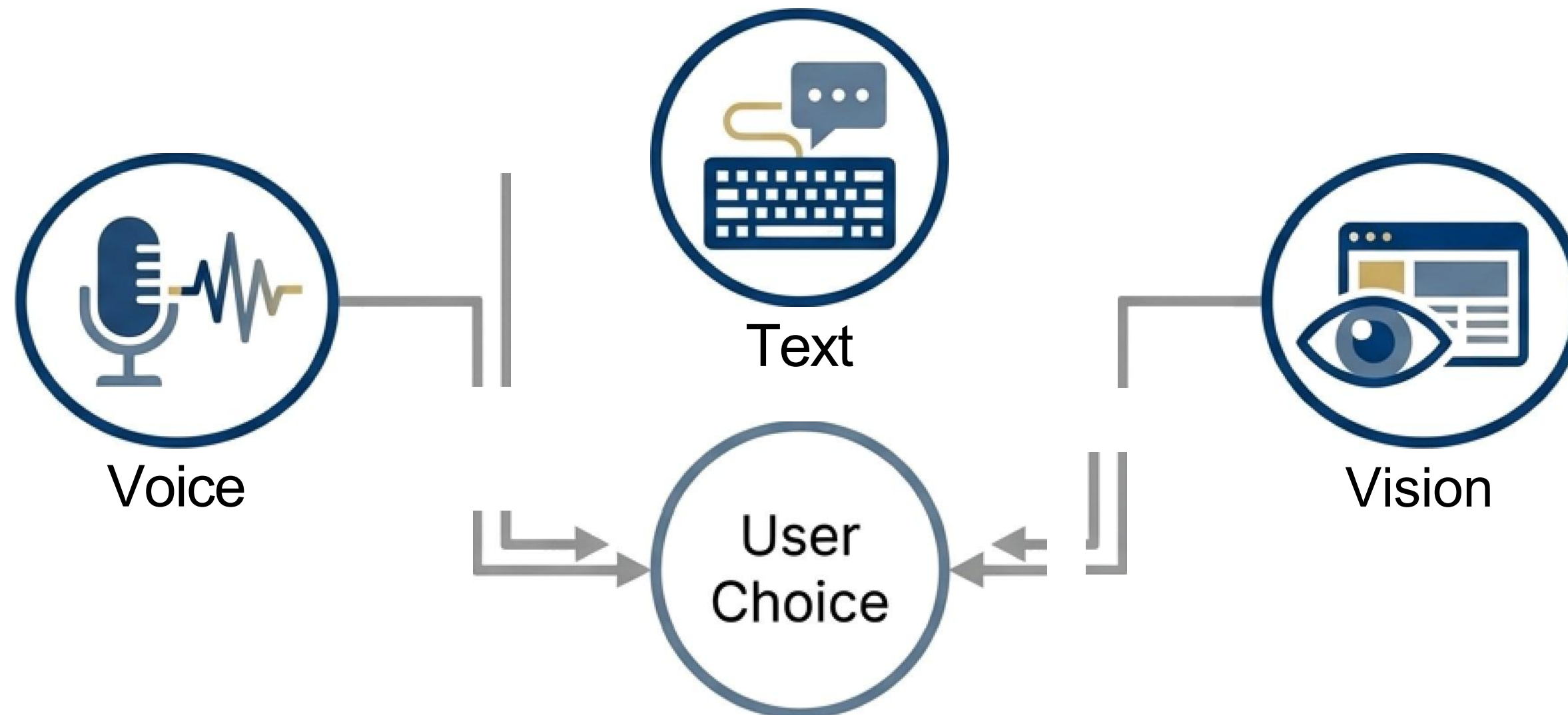
Emma can perform **browser-based actions** to assist the user **always** within existing permissions.



This is not a “super-user“ bot. Emma acts as an extension of the employee, automating clicks and navigation only where the employee is already authorized to go.



Multimodal Interaction: Learning While Doing



Strategic Value: Guidance happens *while work is being done*, not before or after. This enables on-the-job upskilling without adding training overhead or requiring separate enablement sessions.

Enterprise-Grade Security and Governance

Built for the enterprise, not the consumer web.



Auditable Architecture.

Built on a Python-based codebase that is fully transparent and auditable by IT security.



Secure Deployment.

Supports self-hosted tools and secure local or cloud deployment options.



Strict Access Control.

Adheres strictly to the user's existing access rights. No data leakage between permission levels.



Security & Compliance: Self-hostable tools, Python-based codebase, Auditable architecture, & secure deployment (local or cloud)

Current Status and Implementation Strategy



Strategy:

We are intentionally **prioritizing controlled evaluation over speed**. This ensures we prove value and safety in a contained environment before scaling.

The Business Case for EMMA Finance

Efficiency



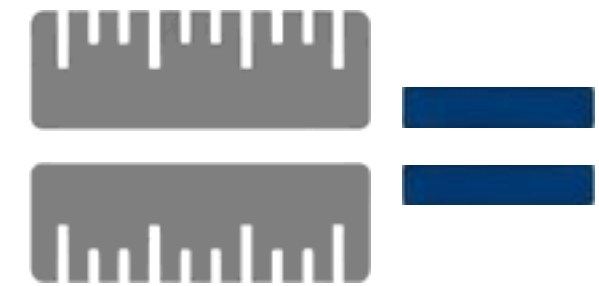
Significantly less time spent searching for guidance. Information is retrieved instantly.

Focus



Senior experts face fewer interruptions, allowing them to apply expertise where it adds the most value.

Consistency



Finance procedures are executed exactly as written, reducing variance and operational risk.

Summary: Moving from static documentation to dynamic, active support.

Making Knowledge Usable at the Point of Impact

“The question is no longer how to add more documentation or training. The real question is: **How do we make existing Finance knowledge usable at the exact moment it's needed?**”