



Infrastructure. Anywhere.



MOVE FASTER, SAFELY: CITIZEN AI FOR FINANCIAL SERVICES WITH NEURALSEEK + CPP ASSOCIATES



by Paul O'Dell, Partner

HOW NEURALSEEK + CPP ASSOCIATES HELP YOU MOVE FASTER, SAFELY.

Legacy financial services organizations face a familiar paradox: innovate at the speed of a fintech while operating with the risk posture of a hundred-year-old bank. Customers want instant answers, personalized experiences, and frictionless onboarding. Regulators demand explainability, audit trails, and strong controls. Meanwhile, teams want automation and better tools—but with guardrails that prevent shadow IT, data leakage, and model risk.

That's why NeuralSeek and CPP Associates are partnering to bring Citizen AI development velocity to financial services organizations in a safer, more foundational way. The goal isn't to sprinkle AI onto broken processes. It's to help business and technical teams build governed AI capabilities that reduce operational load, improve customer outcomes, and withstand compliance scrutiny.

Let's explore what Citizen AI means in a financial services context, why it matters now, and how our joint approach combines NeuralSeek's AI delivery experience with CPP Associates' cloud, automation, and managed services expertise to make AI practical for organizations of all sizes.

WHAT CITIZEN AI MEANS (AND WHAT IT DOESN'T)

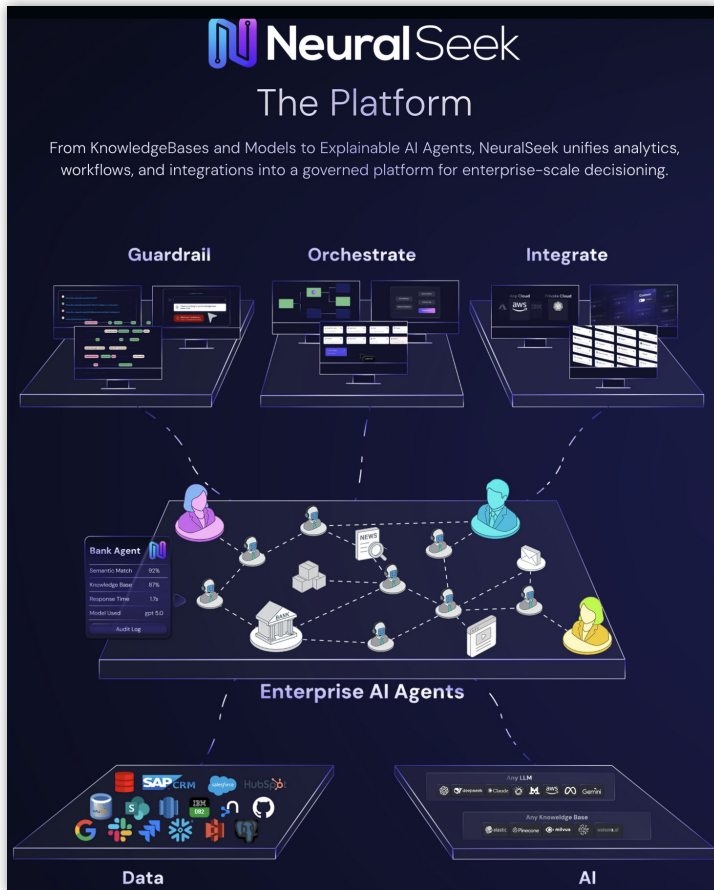
Citizen AI enables people closest to the work, such as operations, customer service, compliance, lending, treasury, finance, and IT, to create and improve AI-powered workflows without waiting months for specialized engineering. But in financial services, citizen cannot mean uncontrolled.

Citizen AI done right includes:

- Pre-approved patterns for data access, prompt design, and workflow automation
- Role-based access controls and identity integration
- Auditability (who ran what, on which data, with what output)

- Model and vendor governance aligned to your risk framework
- Human-in-the-loop checkpoints for high-impact decisions
- Clear boundaries between AI recommendations and decisions

In short: faster development speed with the controls auditors and regulators expect.



WHY FINANCIAL SERVICES ORGANIZATIONS NEED THIS NOW

Most financial services organizations are already experimenting with AI, often in pockets. One team builds a chatbot prototype. Another automates a reconciliation step. A third summarizes call notes. These efforts often stall when they hit the same obstacles:

- Data sensitivity and privacy (PII, PCI, GLBA, SOC2)
- Model risk management and explainability requirements
- Integration complexity with core systems and Microsoft 365
- Operational readiness (support, monitoring, change management)
- Cost control, especially for SMBs with limited staff

Together, NeuralSeek’s Citizen AI approach and CPP Associates’ delivery model become the antidote to “**random acts of AI.**” It creates a repeatable way to deliver value quickly without leaving behind a governance mess. In practice, teams often see results within the first few workflows, including shorter cycle times, higher agent productivity, and faster, cleaner audit preparation, all without increasing risk exposure.

THE JOINT APPROACH: VELOCITY + FOUNDATION

NeuralSeek and CPP Associates bring complementary strengths.

NeuralSeek: Proven AI Delivery Across Regulated and Large-Scale Environments

NeuralSeek’s experience spans complex private and public-sector organizations, including Verizon, NatWest, Telefonica, Snap, Mizuho, Banco do Brasil, Banco Estado do Chile, BROU, Dah Sing Bank, and others. That breadth matters because AI success in financial services depends on delivery, security, integration, adoption, and measurable outcomes. Not just models.

CPP Associates: Cloud, Automation, and Managed Services That Make AI Stick

CPP Associates brings the practical make-it-run capabilities that financial services teams need.

- Cloud architecture optimized for cost, flexibility, availability, and speed
- Automation across multiple platforms to reduce manual effort and admin overhead
- Managed services that fill skill and ops gaps without requiring a full AI and cloud bench

Together, we help you move from AI experiments to operational AI capability.

“If you’re running an SMB, you’re already wearing too many hats. Citizen AI should remove hats, not add new ones.”

**David Roman, Consulting Engineer,
CPP Associates**

AI

WHAT WE CAN DELIVER TOGETHER: FINANCIAL SERVICES USE CASES

Citizen AI delivers value quickly when applied to well-governed workflows.

Customer Service and Contact Centers

- AI-assisted response drafting from approved knowledge sources
- Call and chat summarization into CRM/ticketing systems
- Next-best-action suggestions with human approval
- Faster onboarding for new agents through guided knowledge retrieval

Why it works: These workflows are measurable, repeatable, and tightly governable.

Operations and Back Office Automation

- Automation and AI for repetitive tasks (data entry, reports, file movement)
- AI-driven handling of unstructured inputs (emails, PDFs, forms)
- Automated exception triage and routing
- Reconciliation support and variance explanations

Outcome: Fewer manual touches, faster cycle times, and lower error rates.

Compliance and Risk Support (Not Replacement)

- Policy and procedure Q&A grounded in internal documentation
- Audit evidence drafting and summarization
- Explainable alert triage and third-party risk support

Key point: AI supports the analyst; it doesn't replace accountability.

Relationship Manager and Advisor Enablement

- Meeting prep briefs and research summaries
- Follow-up email drafting and task creation
- Client onboarding checklist automation

Result: More client time, less administrative burden.

SAFE AND FOUNDATIONALLY BETTER: THE GUARDRAILS THAT MATTER

Speed without safety is a short-term win and a long-term liability. Our joint delivery approach emphasizes:

- Secure-by-design architecture (identity, access, segmentation, logging)
- Data minimization and controlled retrieval
- Governed prompt and workflow templates
- Audit trails aligned to internal controls
- Operational support so solutions don't die after the pilot
- Cost management through right-sized cloud patterns and automation

With CPP Associates' managed services, AI workflows aren't just launched. They're supported, monitored, and evolved.

A PRACTICAL PATH TO CITIZEN AI

Most teams don't need a year-long transformation to see value. A realistic path looks like:

- Identify 2–3 workflows with clear ROI and manageable risk
- Establish governance basics: roles, approvals, data boundaries
- Build reusable AI workflow templates and connectors
- Deploy with training to ensure safe adoption
- Operationalize with monitoring and continuous improvement

This **do-it-once, reuse everywhere** foundation turns AI from a novelty into a capability.



WHY THIS PARTNERSHIP MATTERS FOR SMBS AND MID-MARKET FINANCIAL INSTITUTIONS

Smaller and growing financial services organizations need enterprise-grade outcomes without enterprise-sized teams. NeuralSeek + CPP Associates is designed for that reality.

- Proven AI delivery experience in regulated environments
- Cloud, automation, and managed services to keep solutions stable and cost-effective
- A governed path to empower **citizen builders** without losing control

WHERE TO START

If you want AI velocity without compromising governance, start with one high-value workflow and build from there.

NeuralSeek and CPP Associates can help you:

- Select the right initial use cases
- Design the guardrails
- Implement and support AI workflows through managed services and continuous optimization

Citizen AI isn't about letting everyone "go build bots." It's about enabling your teams to improve the business—quickly, safely, and in a way that stands up to real-world financial services requirements.

ABOUT CPP ASSOCIATES

Founded in 2008, CPP Associates is an award-winning IT Solution Provider serving mid- to enterprise sized organizations throughout the U.S. Northeast region. Our solution portfolio includes the most urgent technology needs today, including **Cloud Optimization, Intelligent Automation (Front Office/Back Office), Modern Infrastructure, Cyber Protection and Recovery, and Managed IT Services.**

With a 2:1 ratio of engineers to sales staff (the reverse of what is typical in the industry), we lead with technical acumen, a stringent analytical focus, and a vendor-agnostic perspective. With the highest level certifications and strong, long-standing relationships with the leading IT manufacturers – such as **Hewlett Packard Enterprise, Microsoft, Fortinet, Palo Alto Networks, Morpheus, Automation Anywhere, and Arctic Wolf** – we provide our customers with unparalleled expertise and “concierge-level” consulting and support 24/7/365.

Our proprietary “**Infrastructure Anywhere Assessment**” factors in more than 100 variables to determine the ideal approach for our clients to deploy “cloud-like” infrastructure to maximize agility with increased utilization while at the same time, meeting demanding business requirements with a focus on technology, service level, security, and costs. Keeping with our philosophy that “**high tech without high touch**” will ultimately fail, we are proud of the powerful human connection we establish with our clients which leverages the synergies of trust and respect and drives our respective success.



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