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**AI that Understands,
Summarizes, and Supports**
– the Intelligent Future of
Advisory Services.

Ailleron Innovation Forum 2025



#AIF2025



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Warmup!

✓ **How long** does it take you to write
meeting notes?



Assumptions:

MoMs **preparation** (follow-up **email**):
~10 minutes

Monthly **interactions**:
~3,000

Time spent:
 $10 \text{ minutes} \times 3000 =$
~30 000 minutes

An abstract graphic featuring a grid of data points, a bar chart with orange and blue bars, and a circular gauge. The background is dark blue with a grid pattern and some text like 'AFCA 2018' and '2018' visible.

500 hours saved!
MONTHLY



Where to start?

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Multilingual transcription is the key.



The most frequently used phrase by a consultant?

"Give me a moment, please."



Challenge #1:

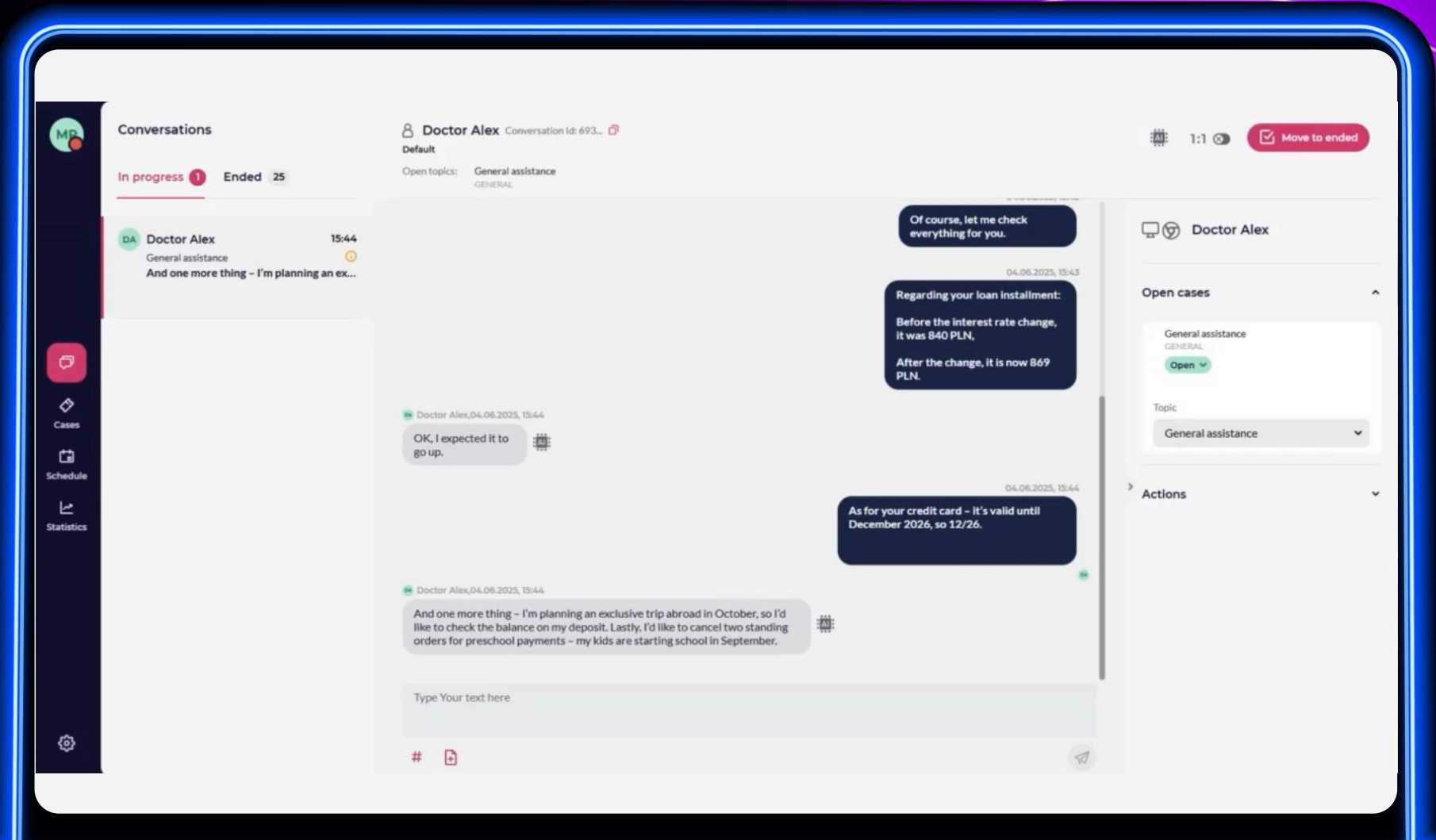
Too long to find the right information.

Goal:

Reduce **manual answers preparation** and improve **self services with „human in the loop“**.



AI Helper and Prompter Agent



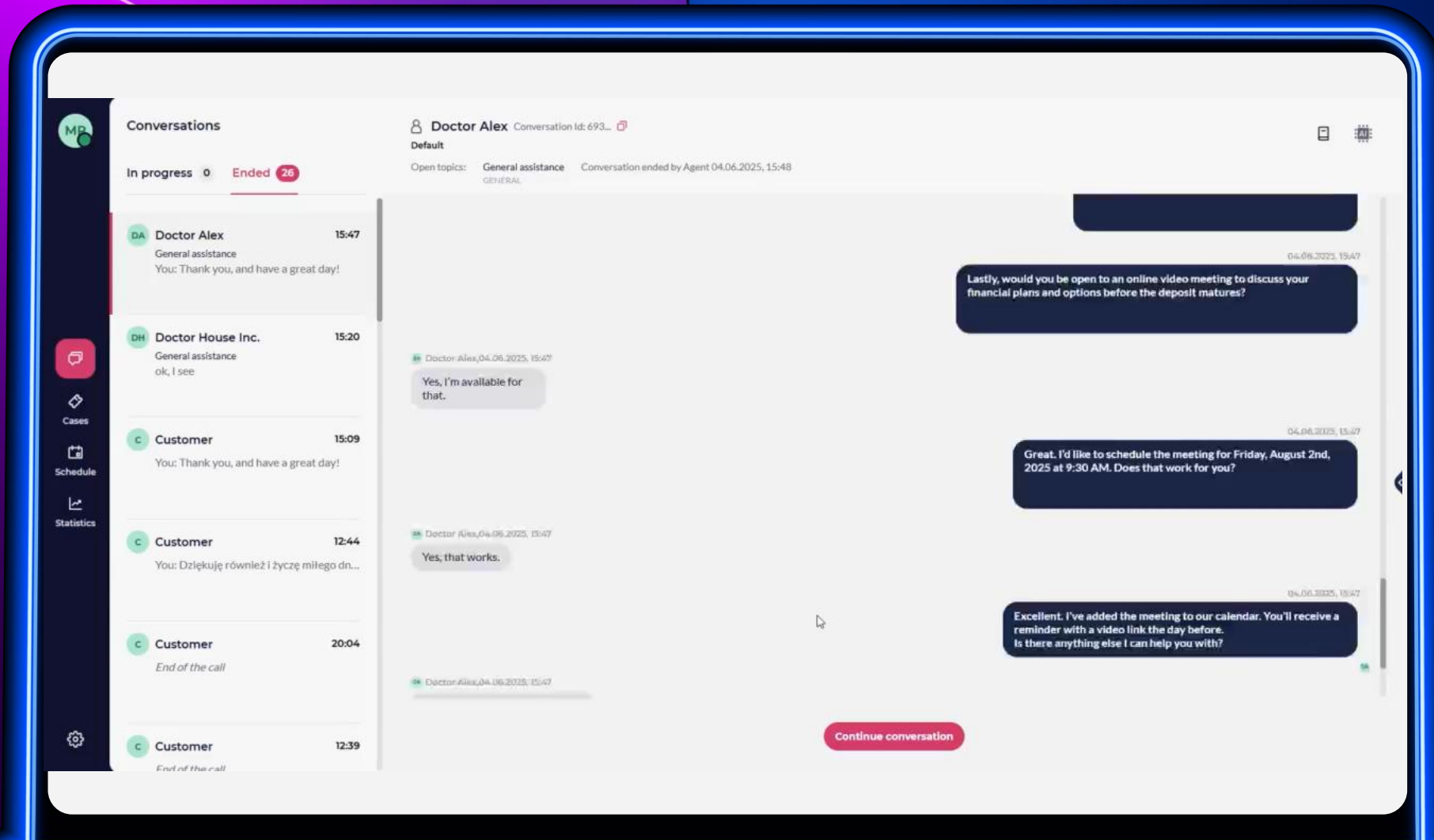
Challenge #2:

Time consuming summaries.

Goal:

Eliminate the need for **manual note-taking**.

AI Conversation Summary Agent





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Challenge #3:

Answering the same routine questions on repeat.

Goal:

Automated FAQ preparation to build the **knowledge**.

Reduce advisors' **engagement** by **improving self services**.

AI Reporter



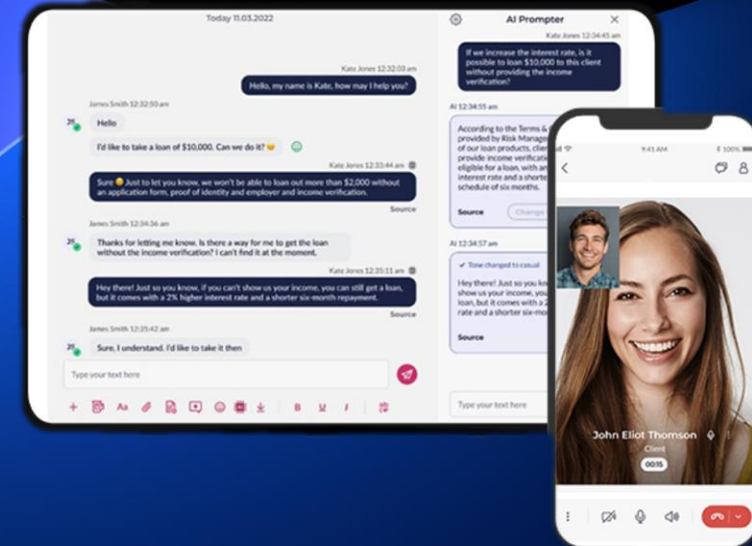
self services



Why Repeat When You Can Predict?



Listen & update FAQ
& answer



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Challenge #4:

Spending too much effort auditing instead of advising.

Goal:

Automate auditing proces.
Focus on what really matters.



AI Auditor



Check & Rate & Improve
(post factum & realtime)

AI Auditor – assesment results

.....
OCENA: No

.....
KOMENTARZ:

Ocena rozmowy wskazuje na niezgodność z wytycznymi, ponieważ konsultant nie zweryfikował tożsamości rozmówcy na początku interakcji.
Brak potwierdzenia danych osobowych klienta, takich jak imię i nazwisko, stanowi naruszenie procedury.
To uchybienie może prowadzić do potencjalnych problemów związanych z bezpieczeństwem danych i dostępem do informacji przez osoby nieuprawnione.

.....

DZIAŁANIA DO PODJĘCIA:

Doradca powinien na początku rozmowy zawsze potwierdzać tożsamość klienta, pytając o imię i nazwisko, aby upewnić się, że rozmawia z osobą, z którą umówione było spotkanie lub która dzwoni w konkretnej sprawie.
W tej rozmowie tego zabrakło, co jest niezgodne z instrukcją.

.....ENGLISH.....
RATING: No

.....
COMMENT:

The call assessment indicates non-compliance with the guidelines, as the consultant did not verify the identity of the caller at the beginning of the interaction.
Failure to confirm the customer's personal details, such as name and surname, constitutes a breach of procedure.
This oversight may lead to potential issues related to data security and unauthorized access to sensitive information.

.....

ACTIONS TO BE TAKEN:

The advisor should always verify the customer's identity at the start of the conversation by asking for their name and surname, to ensure they are speaking with the correct person – either the one scheduled for the meeting or someone calling for a specific matter.
This verification was missing in this call, which is not in line with the instruction.

AI Insights

- **Helper & Prompter** as a tool for quick access to the knowledge.
- **AI Summary** as a tool for better KYC and automated notes.
- **AI FAQ** as a tool for better understanding of customers needs.
- **AI Auditor** as a tool to speed up the auditing processes and focus on what really matters.

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 **Santander**
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Keynotes:

"Time to see AI in a new light:
multidimensional, practical, real"



AI is like a Rubik's
Cube – every
twist reveals a
new dimension of
support.