



DATA REQUISITION COPILOT: 60% FASTER DATA ACCESS FOR A LEADING BANK

DATAMATICS

The client is a global bank having millions of customers across retail, corporate, and banking areas. With data stored in various legacy and new systems, the bank aimed to give its teams quicker access to data while meeting strict regulatory and security requirements.

The Challenge: Slow, Manual, and IT-Dependent Data Access

The client was grappled with an industry-wide challenge of fragmented data trapped in silos. Accessing it was slow and manual, often bottlenecked by IT teams who had to translate every business request into SQL queries.

Even simple requests went through lengthy cycles, including raising tickets, getting clarifications, SQL extractions, validations, and approvals. Business teams waited days for data that was needed within hours. IT teams were overwhelmed by repetitive, low-value requests. Leadership lacked real-time visibility to drive outcomes.

Adding to the complexity, strict regulations prevented the bank from exposing or transferring data outside its secure environment. What they needed was speed without sacrificing security, and access without losing control, a balance many CIOs struggle to achieve today.

The Solution: Conversational Data Access with DRCopilot

Datamatics built an Agentic AI-powered Data Requisition Copilot that allows users to request data through simple natural language yet ensures all data stays within the bank's secure infrastructure.

Key Design Principle: Security First

Although users interact via Microsoft Teams, no data is accessed, stored, or passed through Teams. All data extraction, validation, processing, and delivery happen within the bank's private environment, with Teams acting only as a conversational interface. This ensured zero external data exposure, full compliance with banking regulations and end-to-end auditability & governance.

The solution was delivered in two phases.

Phase 1: Foundation Setup

- Requirement workshops with cross-functional teams
- Implemented prioritized data requests on the Enterprise Data Warehouse
- Enabled NLQ-to-SQL conversion for secure, direct database queries
- Established governance rules, approval workflows, and audit logs

Phase 2: Enterprise Scale-Up

- Extended capability to multiple source systems
- Introduced automated validation, exception handling, and dataset preparation
- Connected backend systems via APIs and secure database layers, all within the bank's controlled environment

As a result, bank received a secure, intelligent, enterprise-grade Copilot that blends conversational ease with strict data protection

Impact: Easy Data Access and Reduced Technical Dependency

60% faster turnaround time
for data requests

Zero data exposure outside
bank systems

40% reduced load on data
engineering teams

3X improvement in data
accessibility

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

Datamatics caters to a diverse global clientele across Banking, Financial Services, Insurance, Healthcare, Manufacturing, International Organizations, and Media & Publishing. The Company has a presence across four continents with significant delivery centers in the USA, India, and the Philippines. To learn more about Datamatics, visit www.datamatics.com

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