

Hal9 Helps Propio Deliver Custom AI-Powered Financial Insights

- **Developed custom AI solution for financial insights using Hal9 Platform in weeks**
- **Enabled Propio to enhance client reports with clear, actionable intelligence**
- **Achieved seamless integration with Propio's existing systems**

"Hal9's platform enabled us to launch advanced AI insights in weeks, with seamless integration that transformed our client reporting"

Rodrigo Carriedo, CEO @ Propio

Customer

Propio, a fast-growing company dedicated to empowering accounting firms, streamlines low-margin tasks to help accountants focus on high-value services. With a mission to expand firms' business and enhance client value, Propio leverages technology to reduce workloads and boost profitability. Their platform serves small businesses by simplifying complex financial processes, making accounting accessible and efficient.

Challenge

Propio sought to enhance their financial reporting capabilities with AI-driven insights tailored to small business owners, who often lack the expertise to interpret traditional financial statements. The challenge was to develop a custom AI solution that could analyze financial data and generate clear, plain-language insights, all while integrating seamlessly into Propio's existing platform. Speed was critical to meet market demands and deliver value to clients quickly.

Solution

Hal9 partnered with Propio to create a custom AI solution using the Hal9 Platform, designed for rapid development and deployment of generative AI models. Hal9's team

of data scientists and engineers collaborated closely with Propio, fine-tuning a mixture of generative AI models to produce actionable financial insights from complex datasets.

The development process included:

- Rapid prototyping with Halg's Python-based workflows to build and test AI models tailored to Propio's reporting needs.
- Fine-tuning models with Propio's curated financial data to ensure accuracy and relevance for small business clients.
- Deploying the solution via a secure, cloud-based API, enabling smooth integration into Propio's reporting tab with a simple bearer token authentication.

Weekly syncs ensured alignment, allowing Propio to provide feedback and refine requirements. The Halg Platform's flexibility enabled Propio to customize outputs without extensive coding, while Halg's infrastructure ensured scalability and reliability. The entire solution was delivered in weeks, not months, meeting Propio's aggressive timeline for a sprint demo.

Results

Halg's AI solution was launched in weeks, empowering Propio to deliver clear, AI-generated financial insights to clients through their reporting platform. The seamless API integration allowed accountants to generate insights effortlessly within their existing workflow, enhancing client satisfaction. The rapid development and smooth deployment strengthened Propio's position as an innovator in accounting technology, enabling them to scale their services and deliver greater value to small businesses.

About Halg

[Halg](#)'s mission is to make "Artificial Intelligence Accessible to Everyone", as we believe AI desperately needs to become more accessible for people worldwide to benefit from this new technology. We have a skilled team of engineers, data scientists, and designers working on this effort. Halg partnered with the [Allen Institute for Artificial Intelligence](#) incubator in 2022.