



# Win deals faster and prove you're secure

NeodyAI for Software & IT services · Software makers, IT and fintech service providers

# Where the time goes in software and IT services



## Questionnaires slow sales

Security questionnaires and RFPs take days of senior people's time.



## SLAs tracked by hand

Ticket SLAs and monthly service reports are assembled manually.



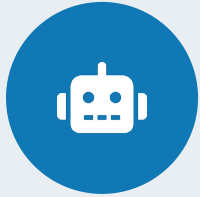
## Audit evidence chased

ISO 27001 and PCI DSS evidence is collected from owners before each audit.

*NeodyAI takes on this work with AI that prepares, checks and chases, while your people decide.*



# AI does the work. Your team stays in control.



## AI does the work

Reads documents, checks them against your rules, drafts and follows up across the systems you already use.



## Your people decide

It runs beside your team first. Autonomy is earned on measured agreement, and taken back automatically when quality drops.



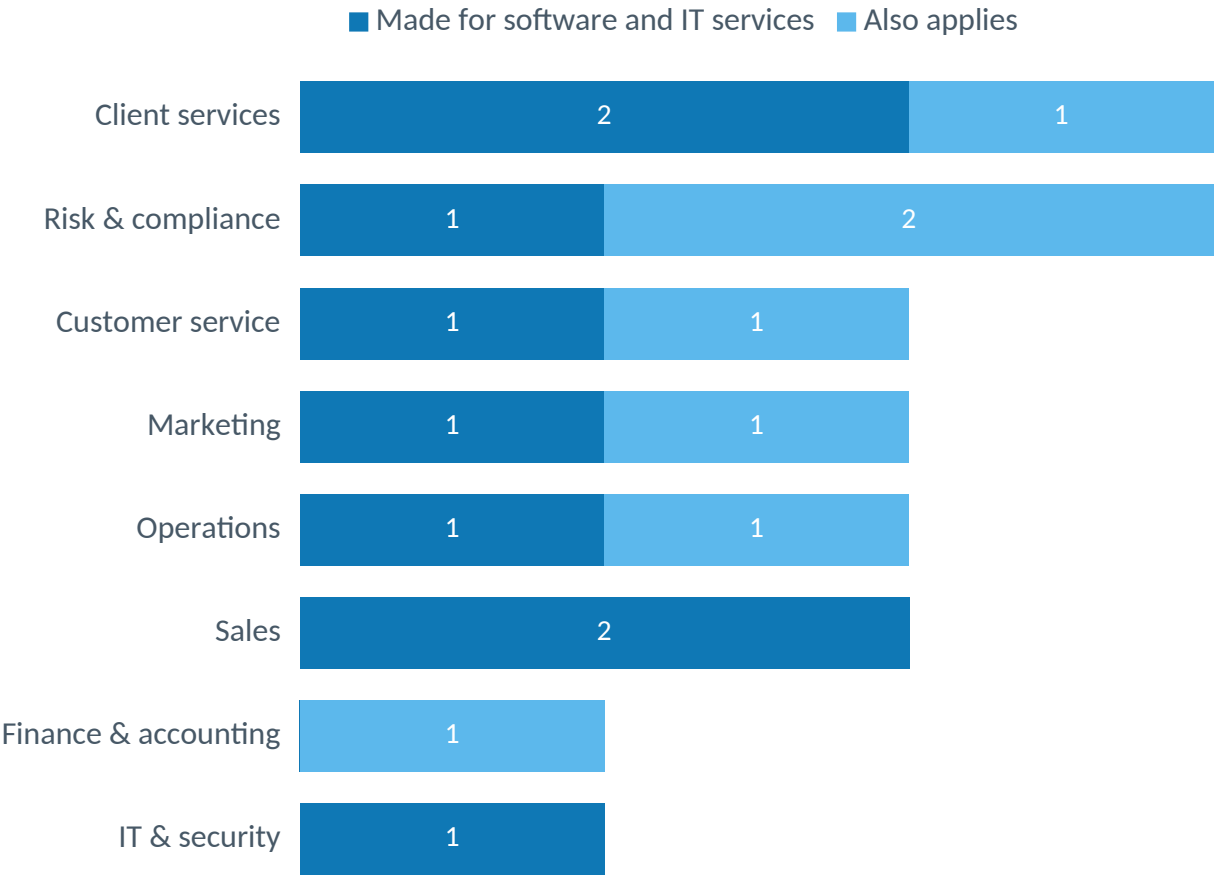
## Your data stays protected

Sensitive fields are protected before any model sees them, and every action is on the record.



# 16 use cases for software and IT services

Use cases by department



9

made for software and IT services

13

high value at low or medium effort

13

touch sensitive data, protected field by field

Every use case is on a card in the appendix.

# Where we'd start

1

SALES

## Answer clients' security & due-diligence questionnaires

Banks' vendor questionnaires and security assessments answered from your policies, certifications and past answers, with each answer's source; new questions go to the right owner.

**Intake & extract → Answer → Draft**

Value high · effort low · Guide

2

CUSTOMER SERVICE

## Client support tickets with SLAs

Client tickets classified by product, priority and SLA, routed to the right team, chased before the SLA breaks and escalated when they do.

**Intake & extract → Route → Follow up**

Value high · effort medium · Guide

3

CLIENT SERVICES

## Implementation & integration projects

Each client implementation's plan, open items and blockers pulled from tickets, mail and meetings; slipping milestones flagged and owners chased.

**Consolidate → Monitor & alert → Follow up**

Value high · effort medium · Guide



# The work AI takes on



7

## Consolidate

Pulls sources together and matches them



5

## Analyse history

Finds patterns in past activity



5

## Draft

Writes the first version for a person to edit



5

## Follow up

Chases people until the gap is closed



5

## Intake & extract

Reads emails, PDFs and forms



5

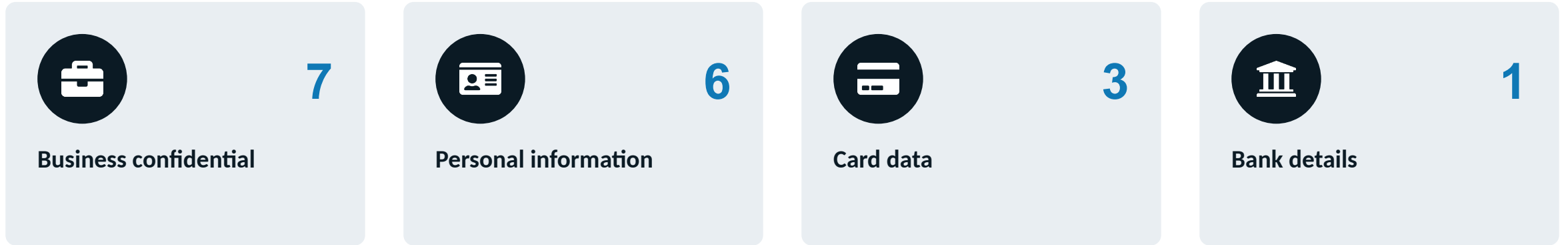
## Validate

Checks documents and data against your rules

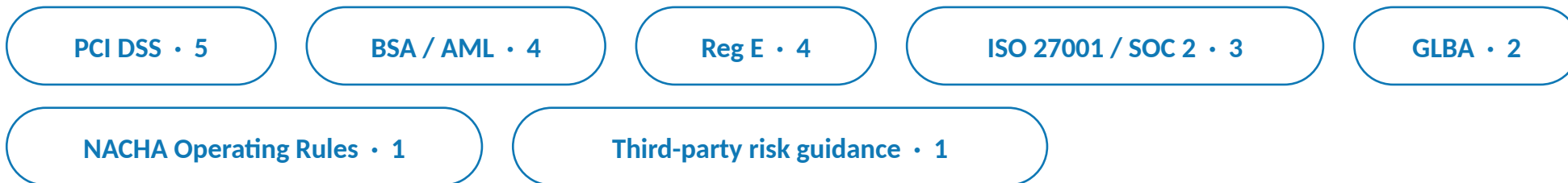


# Your sensitive data stays protected

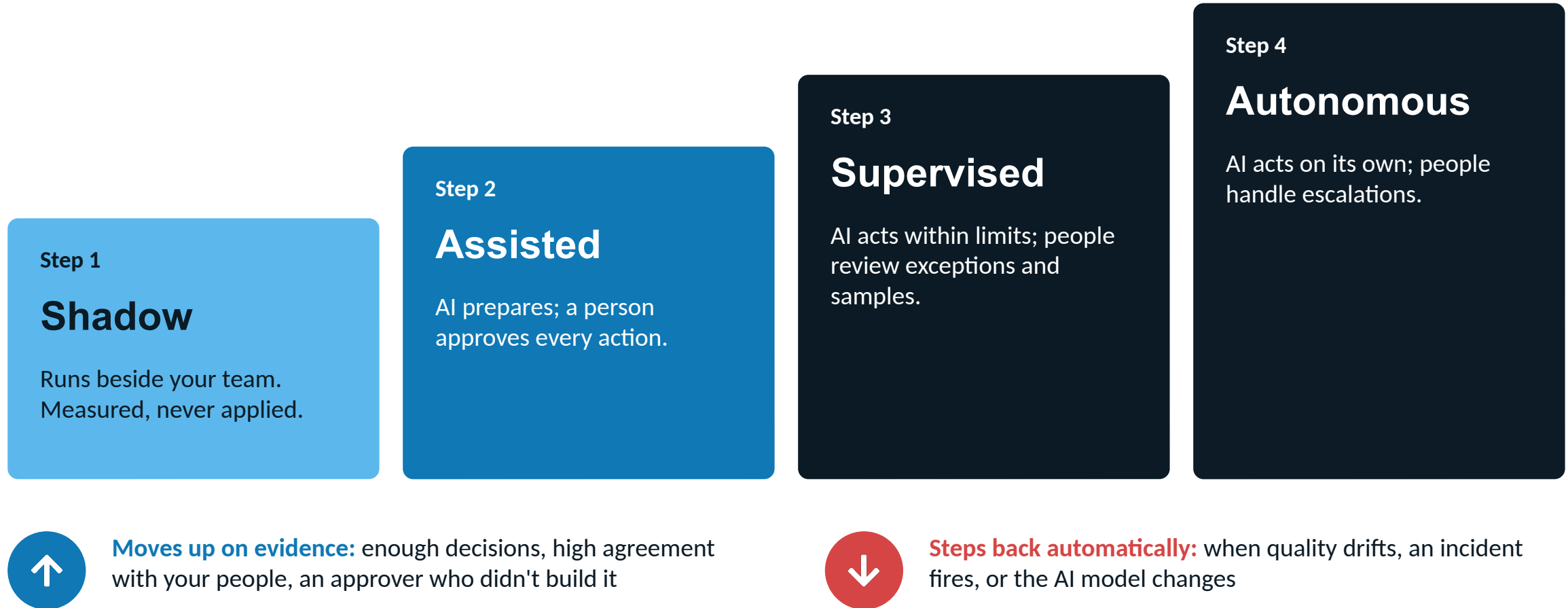
Sensitive data these use cases touch



Rules they fall under



# Your team approves until the AI has earned more



# Works with the systems you already use



**Core banking & GRC**

6 use cases



**Email**

6 use cases



**Service desk**

6 use cases



**Shared files**

6 use cases



**CRM**

2 use cases



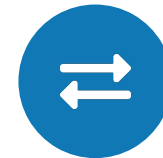
**Customer support  
desk**

2 use cases



**Accounting system**

1 use case



**Bank feeds**

1 use case



# How to get started



01

## Try the free workflows

Run sample processes free, including one on protected sample data



02

## Pick your first use case

We'd suggest Answer clients' security & due-diligence questionnaires, or the pain that costs you most



03

## Run it beside your team

Nothing is applied until your people agree with its work



04

## Add the next one

The second use case is faster: connections and approvals already exist

# Use cases made for software and IT services (1 of 2)

## CLIENT SERVICES

Medium risk

### Implementation & integration projects

Each client implementation's plan, open items and blockers pulled from tickets, mail and meetings; slipping milestones flagged and owners chased.

Consolidate → Monitor & alert → Follow up

Value high · effort medium · Guide

## CLIENT SERVICES

Medium risk

### Monthly SLA & service reports

Uptime, ticket volumes, SLA results and transaction numbers rolled into each client's monthly report, with what changed and why.

Consolidate → Analyse history → Draft

Value medium · effort low · Guide

## RISK & COMPLIANCE

Medium risk

### Security certification evidence (ISO 27001, PCI DSS)

Evidence for each control gathered from systems and owners, checked against the standard, and gaps chased before the auditor arrives.

Consolidate → Validate → Follow up

Value high · effort medium · Guide · ISO 27001 / SOC 2 · PCI DSS

## CUSTOMER SERVICE

Medium risk

### Client support tickets with SLAs

Client tickets classified by product, priority and SLA, routed to the right team, chased before the SLA breaks and escalated when they do.

Intake & extract → Route → Follow up

Value high · effort medium · Guide

## MARKETING

Low risk

### Release notes & client communications

Release notes, maintenance notices and change announcements drafted from the change list and sent in each client's language.

Draft → Translate

Value medium · effort low · Guide

## OPERATIONS

Medium risk

### Payment transaction monitoring

Transaction flows on the payment platforms watched for failures, latency and unusual patterns; clients and on-call engineers alerted.

Monitor & alert → Analyse history

Value high · effort medium · Guide · PCI DSS



# Use cases made for software and IT services (2 of 2)

SALES

Medium risk

## Answer clients' security & due-diligence questionnaires

Banks' vendor questionnaires and security assessments answered from your policies, certifications and past answers, with each answer's source; new questions go to the right owner.

[Intake & extract](#) → [Answer](#) → [Draft](#)

Value high · effort low · Guide · Third-party risk guidance · ISO 27001 / SOC 2

SALES

Medium risk

## Tender & RFP responses

Requirements in a tender extracted into a compliance matrix and answered from product sheets and past bids, in Spanish or English.

[Intake & extract](#) → [Consolidate](#) → [Draft](#)

Value high · effort medium · Guide

IT & SECURITY

Medium risk

## Security alert triage

Alerts from monitoring tools enriched, de-duplicated and ranked; the likely-real ones escalated with the evidence, the noise closed with a reason.

[Intake & extract](#) → [Analyse history](#) → [Route](#)

Value high · effort medium · Guide · ISO 27001 / SOC 2 · PCI DSS



# Also applies, from other industries (1 of 2)

## CLIENT SERVICES

High risk

### Card program onboarding

A new business, government or fintech card program set up: agreements, program details, KYB documents and sponsor-bank approvals collected, checked and chased until launch.

[Intake & extract](#) → [Validate](#) → [Follow up](#)

Value high · effort medium · Guide · BSA / AML · GLBA

## RISK & COMPLIANCE

Medium risk

### Card fraud & velocity monitoring

Card activity watched for velocity, geography and merchant patterns; likely fraud routed to an analyst with the evidence, the rest released.

[Monitor & alert](#) → [Analyse history](#) → [Route](#)

Value high · effort medium · Guide · PCI DSS · BSA / AML

## RISK & COMPLIANCE

Medium risk

### Sponsor-bank & program reporting

Program volumes, balances, complaints, disputes and compliance metrics rolled into the sponsor bank's monthly and quarterly reports, checked before they are sent.

[Consolidate](#) → [Validate](#) → [Draft](#)

Value high · effort medium · Guide · BSA / AML · Reg E · GLBA

## CUSTOMER SERVICE

High risk

### Cardholder support (balance, card status, lost card)

Cardholders' questions answered from the system of record (balance, transactions, card status); lost or stolen cards locked on request, with anything unusual handed to a person.

[Answer](#) → [Converse](#) → [Execute](#)

Value high · effort medium · Guide · Reg E · PCI DSS

## MARKETING

Medium risk

### Cash-back rewards offers & settlement

Which offers drive card use, by program and merchant; rewards calculated, settled with merchants and reconciled to what cardholders received.

[Analyse history](#) → [Recommend & optimise](#) → [Consolidate](#)

Value medium · effort medium · Guide

## OPERATIONS

Medium risk

### Benefits disbursement checks

Each federal or state benefits disbursement file checked against eligibility and the prior cycle before cards are loaded; duplicates and outliers held for a person.

[Validate](#) → [Monitor & alert](#)

Value high · effort medium · Guide · BSA / AML · Reg E



# Also applies, from other industries (2 of 2)

## FINANCE & ACCOUNTING

High risk

### Payroll & benefits card funding reconciliation

Each funding file from an employer or agency matched to the money received and the card loads; short, late or duplicate funding chased before cardholders are affected.

[Consolidate](#) → [Validate](#) → [Follow up](#)

Value high · effort medium · Guide · NACHA Operating Rules · Reg E

