

Enhance staff efficiency with The Internal Knowledge Agent

Your staff are hired for their judgement, empathy and expertise, not to search through folders, emails and policy documents for answers.

Accessible instantly from the taskbar, the Internal Knowledge Agent is a secure AI chatbot that provides instant, accurate answers based on your product sheets, policies, procedures and guidelines — so your staff can focus on serving members and running the credit union.

CHALLENGES:

 Time lost searching for documents and templates for information

 Inconsistent answers across departments and branches

 Inconsistent communication styles across departments and branches

 Manually digging through files to find inconsistencies in old documents when policies and procedures change

 Slow onboarding and reliance on experienced colleagues

 Knowledge held by individuals rather than the organisation

SOLUTION:

AN INTERNAL KNOWLEDGE AGENT

 Instant answers based on your policies, forms and procedures

 Consistent, up-to-date, policy-aligned responses every time

 Draft emails generated in line with your templates, tone and brand guidelines

 Receive an email highlighting potential inconsistencies between documents

 An intuitive, AI-powered assistant that supports staff from day one

 Centralised access to institutional knowledge, available to all staff

The Internal Knowledge Agent is a **trusted** assistant for every member of staff.

Built for **your** credit union

The Internal Knowledge Agent is not a generic AI tool. It is:

- Bespoke to each individual credit union
- Trained only on your approved internal documentation
- Aligned to your processes, products and tone
- Configured to your governance and compliance requirements
- Delivered and supported by CU Apps

Your Internal Knowledge Agent understands your credit union because it is built around it.

Never forget a **document review**

The Internal Knowledge Agent monitor review dates and send your team an email reminder two months before a policy or procedure is due for review, so nothing gets left behind.

Keeping your knowledge **accurate**

The Internal Knowledge Agent works alongside your existing document storage, such as SharePoint, so your existing systems remain the source of truth.

When a document is updated, the Internal Knowledge Agent scans the entire document storage and flag existing documents that may contain conflicting information, so that you can update these too.

CU Apps has secured an **enterprise-level AI** agreement that ensure your data is **protected** and never used to train external models.

Your **data** stays yours

Unlike publicly available AI tools, the Internal Knowledge Agent can be installed directly onto your local machines or within your secure Virtual Desktop Environment.

- Your documents and internal conversations are never used to train public AI models
- Your knowledge and data remain private to your credit union
- Retention and PII settings are configurable to align with your credit union's policies

Ready to See the **Difference**?

Contact CU Apps to book a free demo and see how CU Chat can work for your credit union.

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