CAPABILITY BRIEF

Put AI to work in financial services.

Product design, engineering and evaluation for banks, wealth managers and financial platforms.

Onboarding and document review

Connect document intake, suggested fields and exception review. Agree how reviewers inspect sources, correct information and decide what happens next. Measure handling time, rework and suggestion quality against the existing process.

Advisor and client workflows

Bring portfolio information, communication and document-grounded assistance into a usable financial product. Start with the people using it and the systems your team already operates.

Evaluation of existing AI

Establish representative tests, known failure conditions and operating signals. Review answer quality, source grounding, permissions, latency and cost in the context of the task.

A team for the whole product

Windmill brings product experience, engineering and evaluation together. Swiss headquarters and published ISO 27001:2022 certification information support the delivery conversation; project-specific requirements are agreed in scope.

Financial-services work and engagement options

BUYING THE WORK

Start with the decision in front of you.

Each engagement can stand on its own. Existing work and supplier relationships inform the starting point.

AI Strategy & Readiness

Prioritise the opportunity and align product, technical and operating decisions. Outputs include a decision map, feasibility direction and the next-stage recommendation.

Proof of Value

Test a bounded workflow with representative data and users. Receive a working slice, evaluation baseline, constraints and a recommendation. Current typical duration: 1.5–2 months.

Product Build & Scale

Design, engineer and integrate a production product, or improve an existing one. Agree release criteria, team responsibilities, monitoring and any continuing operating scope.

Evaluation & Assurance

Evaluate a live system, including work built elsewhere. Receive representative tests, quality and operating signals, failure analysis and a prioritised improvement plan. Initial assessment typically 1.5 months.

Before work starts

The proposal defines scope, fees, deliverables, client inputs and acceptance criteria. Bring one workflow, its current owner and the decision you need to reach. Confidentiality is agreed before sensitive material is reviewed.

[Discuss your financial workflow]