



# Revolutionizing America's Local Mortgage [Financial Services]

Gen AI, Vertex AI, PaLM2, Dialogflow

## Highlights

CloudWerx transformed Customer's loan processing with GenAI Underwriting Copilot. Leveraging Google Cloud Vertex AI and PaLM2, we built a custom Dialogflow agent that automates document review across various loan products. This AI solution streamlines workflows, accelerates underwriting, and empowers loan officers, leading to faster loan approvals.

### Challenge:

Manual document review in underwriting slows loan processing. Customer needs AI solution to analyze documents across all loan products, streamlining the process for faster decisions.

### Solution:

CWX revolutionized Customer's underwriting platform using Vertex AI, PaLM2 LLM, and Dialogflow. We set up a Vertex landing zone, processed docs, and deployed a datastore. A custom Dialogflow agent was built using PaLM2, prompt engineering, directed RAG, and NLP for a tailored underwriting solution.

### Outcome

Our Vertex AI solution streamlined underwriting. This solution analyzes loan docs across products, speeding up approvals, workflows, and officer efficiency.