

# CGI Managed Infrastructure Services

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# CGI Managed Infrastructure Services - Credit Union Context



*Credit unions are operating in an environment of constant change—rising member expectations, expanding digital ecosystems, increasing regulatory scrutiny, and growing operational complexity.*

*In this context, infrastructure is no longer just about keeping the lights on; it is the foundation that enables resilience, security, and the confidence to modernize at the right pace.*

# CGI has over 46 years of experience in the field of global IT infrastructure management and transformation

A network of certified data centers capable of meeting in-country requirements and providing a global reach



**23 Data Centers** – globally in Americas, Europe, Asia. Consistency of Data Center services *and* service delivery across all centers



30,000 m<sup>2</sup> of raised floor capacity in our data centers; **70K+ Servers**; **18.5K+ MIPS**, **60+ PB storage**; **desktop support 690K+ devices**; support all major HW manufacturers; **Technology Vendor independence**



Compliance with local security aspects by retention of critical data and IT infrastructure in-country. Government and Industry **Certifications audited annually (ISO 9001, 14001, 27001, 20000, CMMI)**



**10,000+ (2k in Canada)** Infrastructure Professionals; **13 Gold and 3 Silver** Microsoft Global Certifications; **12 Cloud Service Provider** countries



**10M+** contacts supported through global service desk; **Multi-Channel / Multilingual** support; **Robotics Process Automation (RPA)**; **Certified & security-cleared** members; reporting on **250+ Service Level Objectives, Agreements and Key Performance Metrics** monthly



Ongoing **consolidation, improvement and innovation**



# CGI Managed Infrastructure Services

CGI provides full end-to-end IT infrastructure services to our corporate business units from its secure, state-of-the-art data centers coupled with public cloud tenancies



## Technology Advisory Services

Advisory, Design and Implementation Consulting Services



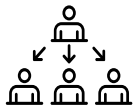
## Workstation Engineering & Support

Standard and VIP level support for enterprises, Mobile Device Management, Device Configuration (Imaging), Application Packaging



## Service Desk

Multi-Channel turn key solution for technical support services



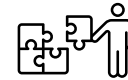
## Client Centric Delivery Model

Dedicated model to drive adoption of DEVOPS and Agile delivery



## Data Center Services

Hosting and Managed services for back office services



## Cyber Security & Infrastructure Support Services

Core support for technology operations including Service Management, Disaster Recovery, Major Incident Management, Data Management, Vulnerability Management etc.,



## Shared and Private Cloud

Hosted cloud offerings with provisioning automation and incorporated Infrastructure Support Services



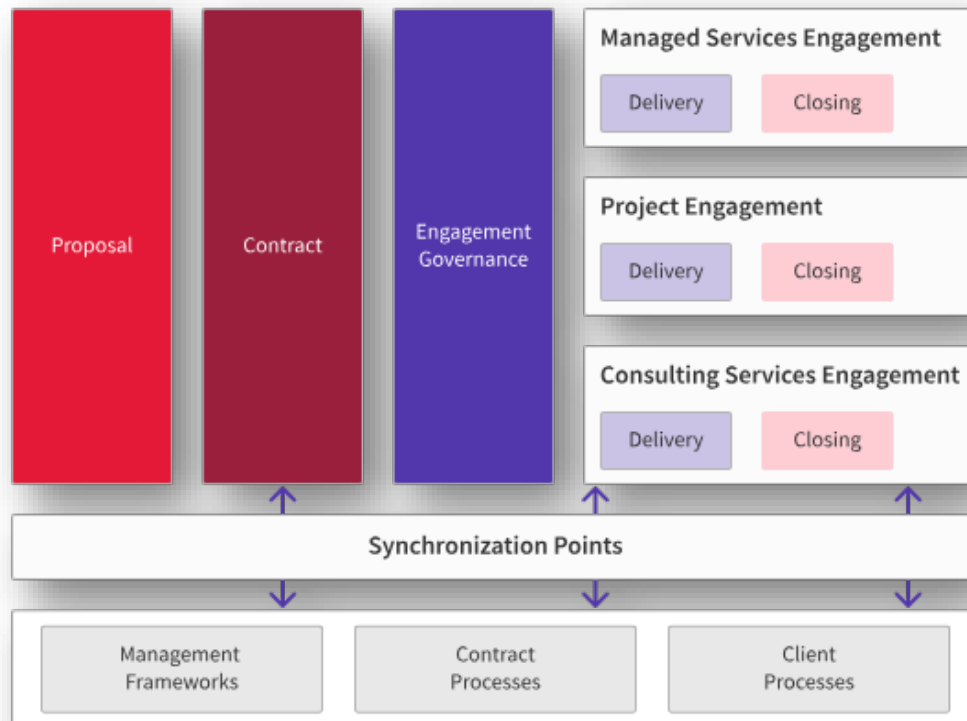
## Management and Automation Systems

Hybrid IT management systems for day-to-day management, provisioning, monitoring and delivery of enterprise services

# Management Frameworks: CGI's Sustainable Competitive Advantage

## Client Partnership Management Framework (CPMF)

Our Client Partnership Management Framework (CPMF) is a set of comprehensive principles and processes that govern the management of our client relationships.



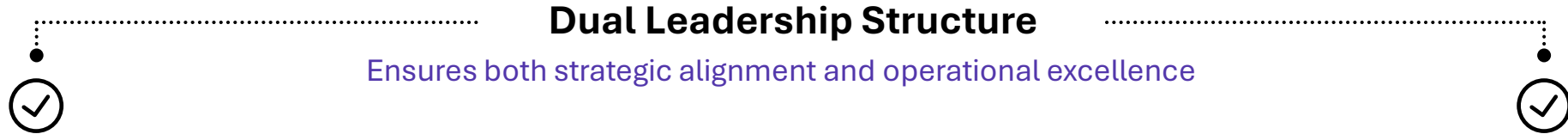
## Operational Framework

The Operational Framework (OF) is a key element of CPMF and defines the policies, practices, people and tools required for outsourcing engagements.

- It ensures all participants understand the project organization and reporting relationships
- It defines the day-to-day organizational structure, management practices, process touch points, key activities, participants and roles and responsibilities in place to fulfill the service delivery commitments.

# Governing Successful Engagements

With over 35 years of experience delivering tailored solutions to Canadian credit unions, we currently support 150 credit unions through a national practice that combines localized expertise with global delivery capabilities.

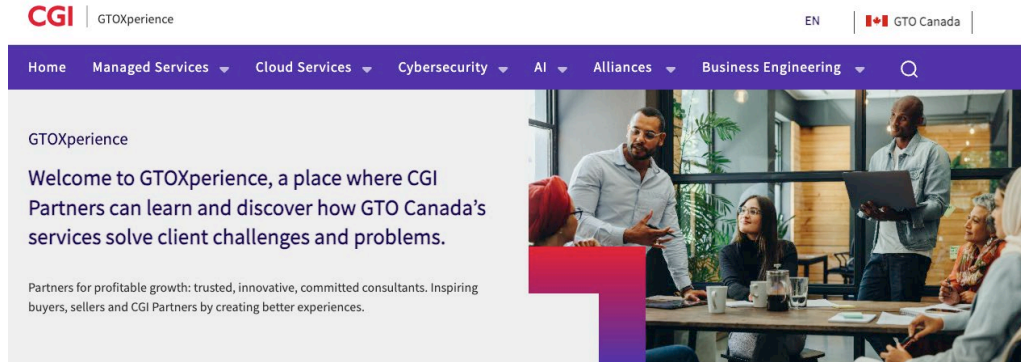


**Engagement Manager**  
Serves as the strategic lead. This individual is responsible for overall governance of the engagement; is the primary liaison with your executive team.

**Service Delivery Manager**  
Service Delivery Manager is responsible for the day-to-day execution of services; overseeing delivery of your Managed Services, with experience supporting our credit union clients.

- Broader Support and Knowledge Continuity**
- IT managed services expertise in the credit union space.
  - CGI's Global Technology Operations team has delivered infrastructure and managed services for over 46 years
  - 500 certified cloud professionals in Canada who support scalable, secure, and efficient cloud operations.
  - Project Management Office - consistent governance, risk mitigation, and performance monitoring

# CGI Infrastructure Service Offerings: GTOXperience



End-to-end service offerings and projects are represented through our GTOXperience sales enablement platform.

38

Total Service Offerings

7

Cloud Managed Services

14

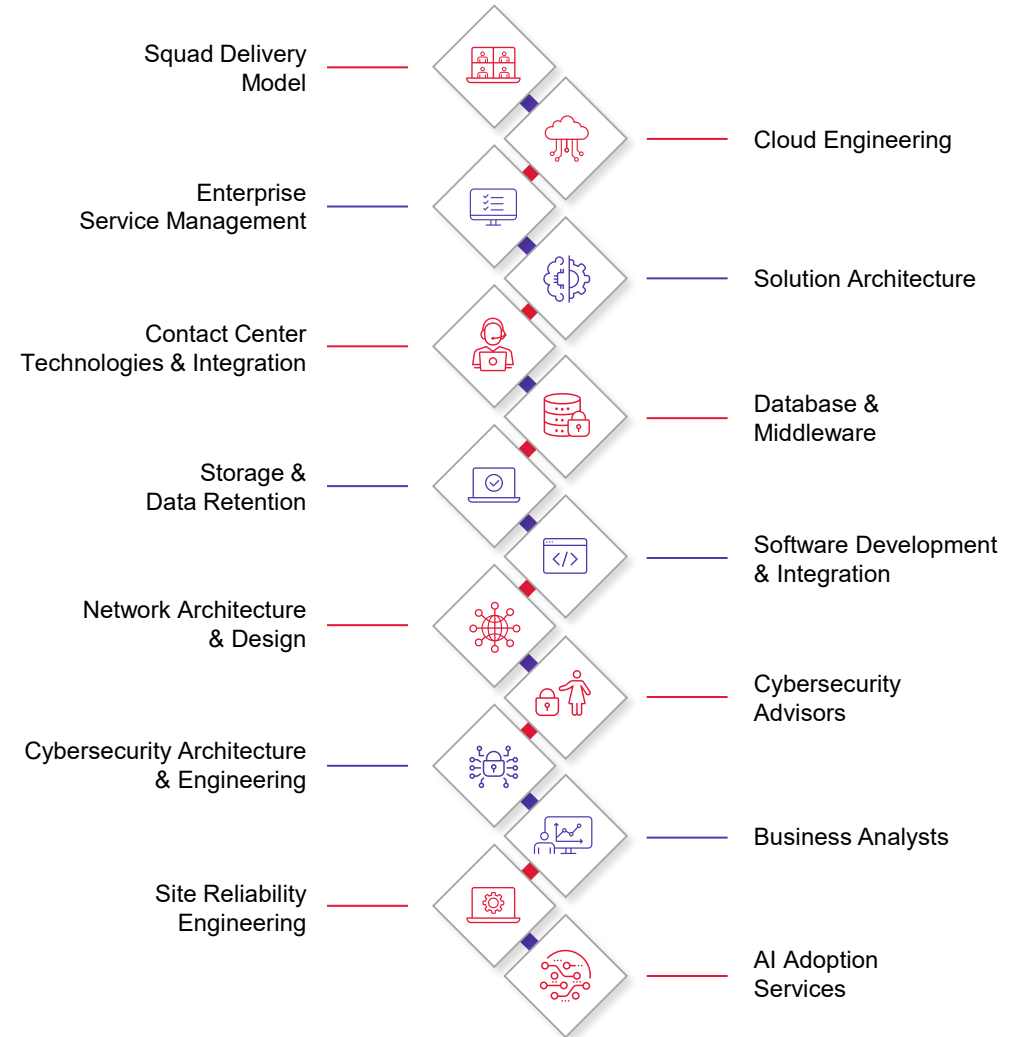
Assessments & Projects

4

Cyber Security Services

2

AI Offerings



# Harnessing the power of our global alliances

**Collaborating with an ecosystem of technology providers to achieve trusted and tangible outcomes**

We are uniquely positioned to build, deploy and manage solutions that **accelerate your digital journey.**

Explore our **network of alliances** on [cgi.com](https://www.cgi.com) >



Amazon Web Services

4,700+ certifications



Google

1,300+ certifications



Databricks

800+ certifications



Microsoft

14,000+ certifications



Salesforce

3,000+ certifications



SAP

1,000+ certifications



ServiceNow

1,100+ certifications



Snowflake

180+ certifications



# Managed Cyber Security Services



# A Global Cyber Workforce

20+ years of diverse experience

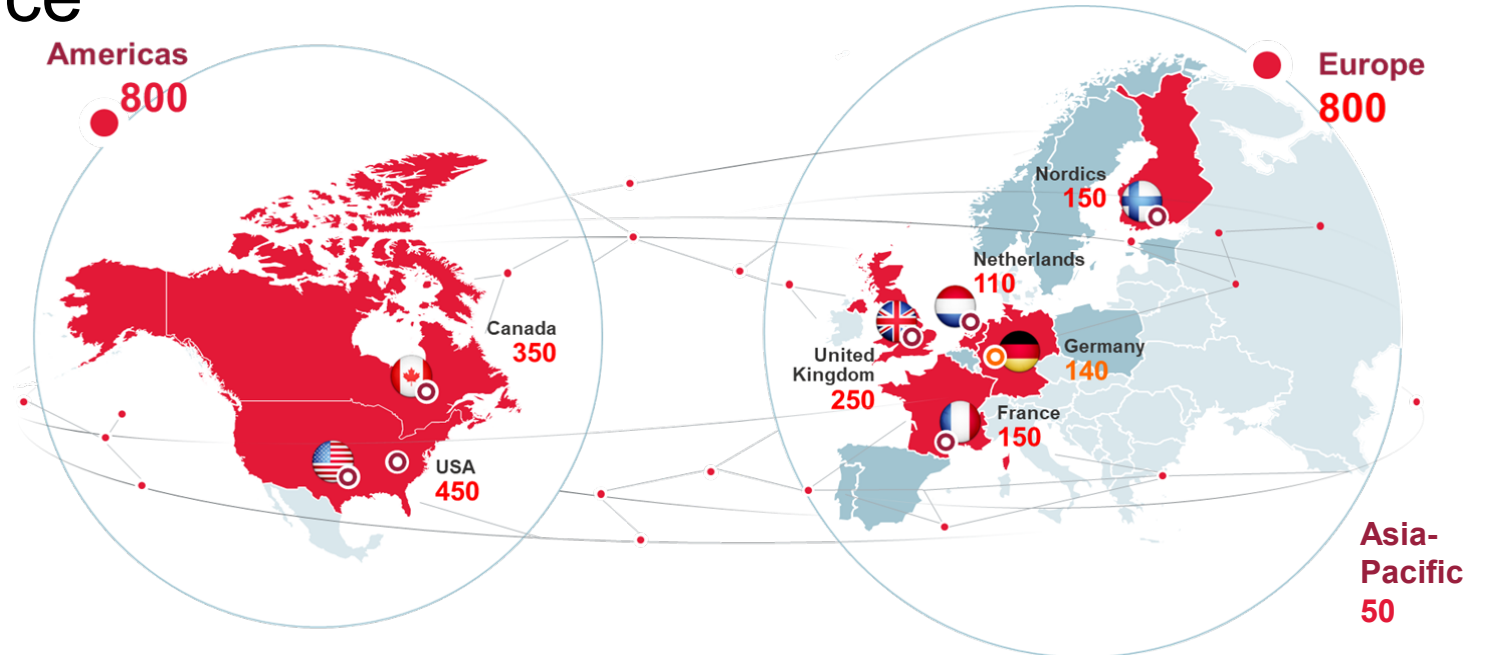
1,650 cyber experts

9 Security Operations Centres

600+ clients in 16 countries

Certified facilities and security cleared resources

Insights informed by our client interactions in key industries across the globe



IDC recognized CGI as a Canadian Security Services Leader & Major Player for MDR services in Canada

## In Canada...

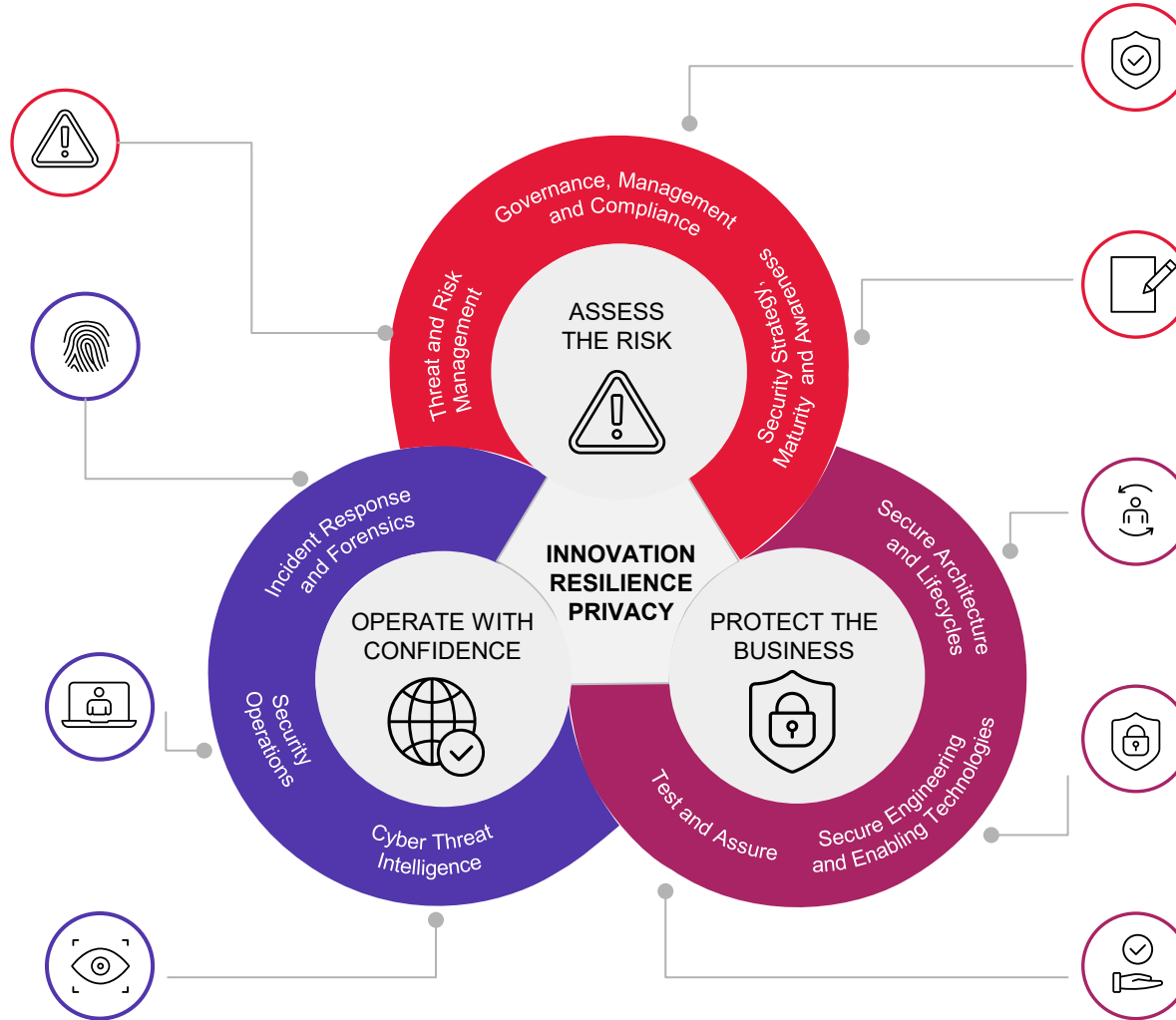
- 386 practitioners in a full range of cyber practice areas
- National coverage
- 24/7 Canadian Security Operations
- ISO 9001:QMS
- ISO 27001 and SOC 2 Type II certified
- ITIL v4 service management processes
- Multi-Industry experience and service (aviation, transportation and logistics, government, crown corp., private sector, etc.)

Microsoft Managed Security Services Provider (MSSP) partner  
Microsoft Intelligent Security Association (MISA) member  
Microsoft Managed Extended Detection and Response (MXDR) partner

# CGI Cybersecurity Services

## How cybersecurity is part of everything we do

- Risk Management Methods
- Cybersecurity Governance Frameworks
- Cybersecurity Program Foundations
- Cyber Incident Management
- Cyber Incident Response
- Forensics Analysis
- Red Teaming
- 24x7 Protective Monitoring
- Managed Detection and Response
- Threat Hunting
- Vulnerability Management
- Phishing Simulation and Triage
- Network Security Monitoring
- Privileged Access Management
- Client Focused Intelligence
- Personal Digital Footprints
- Corporate Digital Footprints
- Industry intelligence insights



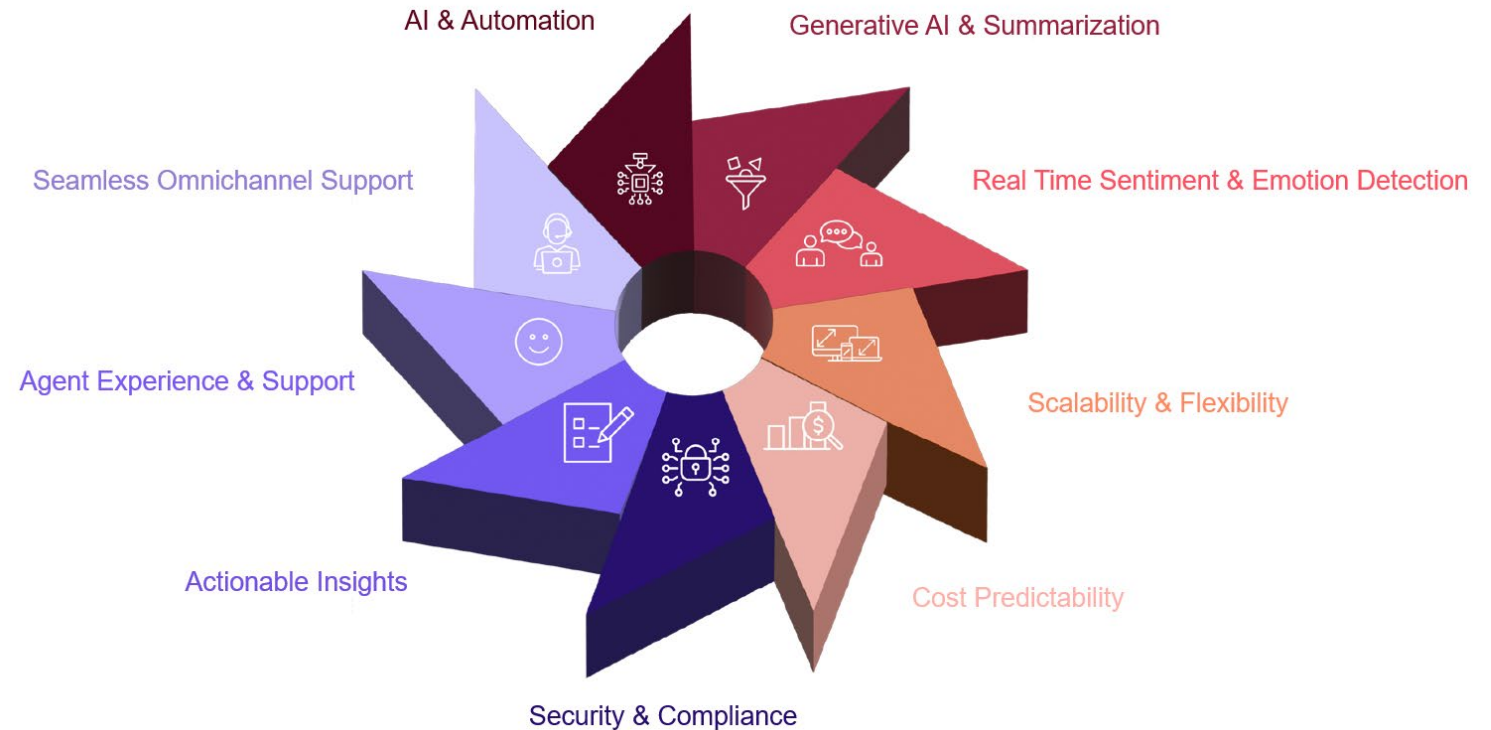
- Risk and Maturity Assessments
- Third Party and Supply Chain Management
- Regulations and Standards
- Frameworks and Compliance
- Information Security Management Systems
- Cybersecurity Strategy and Policies
- Asset Sensitivity and Impact
- Data Labelling and Information Classification
- Assessing Security Impact
- Architecture
- Zero Trust
- Engineering Methods
- Secure System Design
- System Hardening and Deployment
- Enabling Adoption and Migration
- Subject Matter Expertise
- Penetration Testing
- Security Architecture
- Design Assurance
- Implementation Assurance
- Application Security
- Code Assurance

# Modern Workplace Services



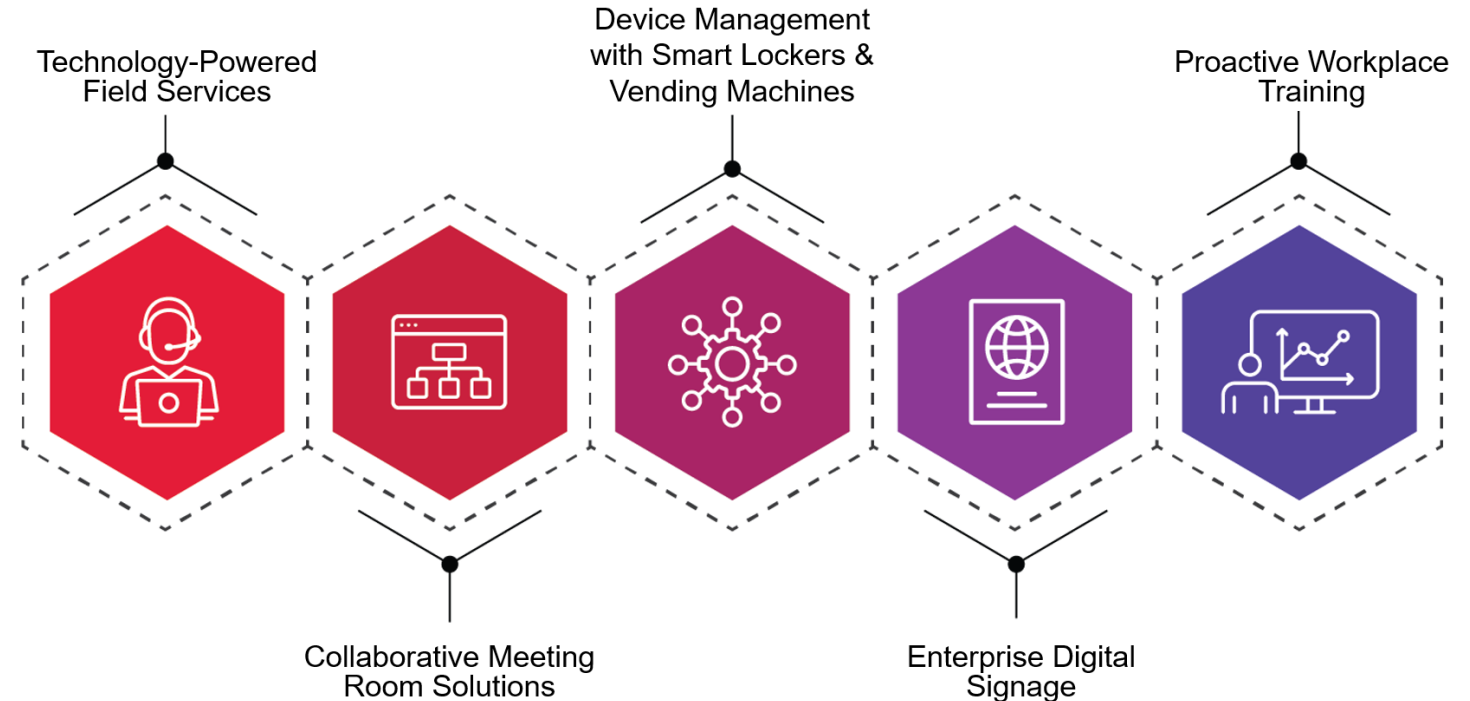
# Managed Modern Contact Center

- AI-enabled, human-led support model combining expert agents with virtual agents, intelligent routing, automation, and predictive insights
- Solved fragmented support with seamless omnichannel service at enterprise scale
- Reduced inefficiency through embedded automation and AI that improve speed, quality, and experience
- Addressed limited visibility with real-time performance insights and strong governance
- Removed delivery constraints with a flexible, scalable support model tailored to business needs
- Mitigate security and compliance risk through a secure, responsible-by-design operating model aligned to ISO/IEC 20000, ISO 27001, and GDPR
- Proven outcome: 90%+ success on automated contact handling, across 25,000+ monthly contacts drove a 35% reduction in live agent demand and 90% customer satisfaction



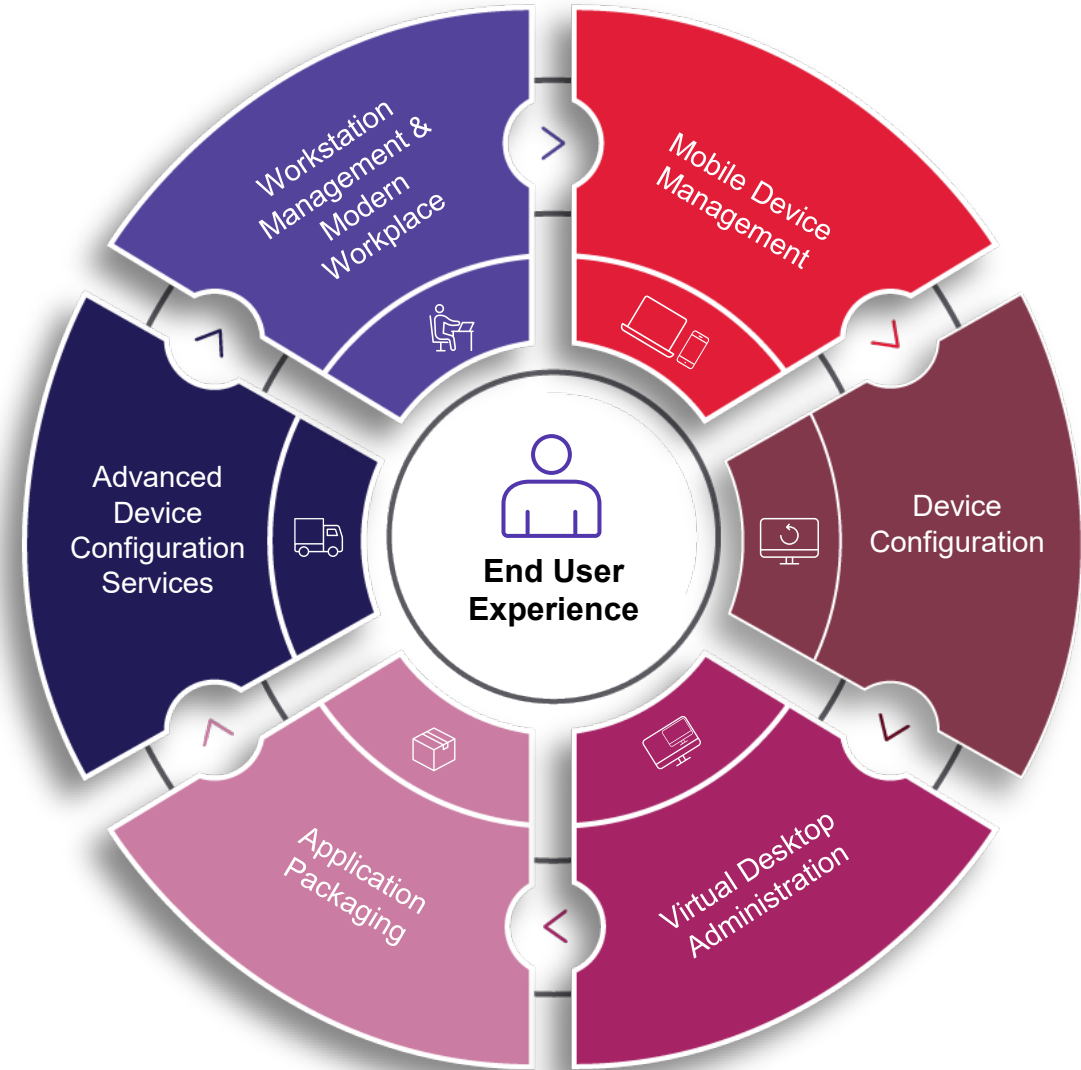
# Tech Hub & Workplace Services

- Evolving from traditional deskside support to modern, technology-enabled workplace services
- Unified delivery across branches, deskside, depots, and collaboration environments
- Automated, secure, zero-touch device provisioning and returns across locations
- Reliable, optimized meeting room and branch collaboration experiences
- Increased adoption through structured workplace training and enablement
- Proven outcomes: 43% faster onboarding through optimized depot and field services
- Proven outcomes: 80% fewer meeting room support calls and improved user satisfaction



# Device Management & Engineering

- Evolving device management across physical, mobile, and virtual endpoints
- Consistent patching, compliance, and secure device health across all endpoints
- Unified tools and processes improving efficiency and visibility
- Strengthened endpoint security, audit readiness, and data protection
- Modernized, secure device management leveraging cloud, Intune, and Autopilot
- Proven outcomes: accelerated onboarding and improved user satisfaction through zero-touch deployment
- Proven outcomes: security compliance improved from ~35% to 85%+

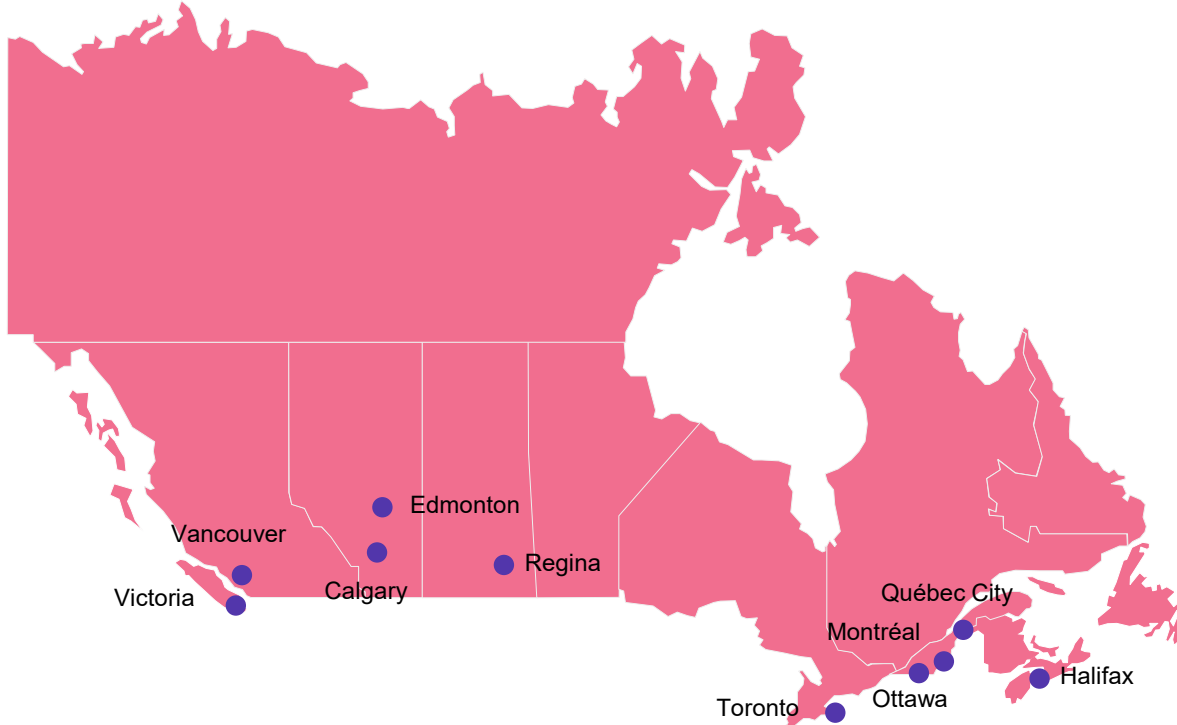


# Managed Cloud Services



# Over 80% of our Clients are in the Cloud

GLOBAL SCALE. PROXIMITY TO CLIENTS. PROXIMITY TO TALENT SOURCES.



- **10M+** citizen interactions to address COVID concerns through cloud-enabled, digital assistants
- **180,000** annual contacts via the Cloud Contact Centre solution
- **\$100M+** in benefits paid out to citizens affected by the pandemic
- **250,000** users migrated to Cloud
- **60+** Data center migrations to Cloud since 2014
- The **first Private Azure** stack in Canada - Deployed and operated
- The **first dual cloud payment bank processing** in Canada

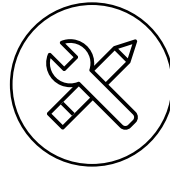
## Partnerships



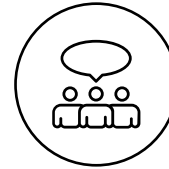
**1500** Trained Cloud Professionals

# Modular approach to your **Cloud Managed Service**

## A SUITE OF **END-TO-END MANAGED CLOUD SERVICES**



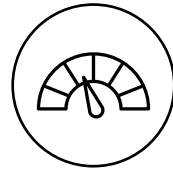
Configuration management



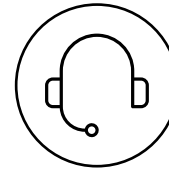
Client-centric service team delivery



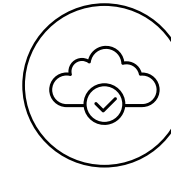
Identify and access management



Monitoring



Support



Back up and disaster recovery



Security

We have your day-to-day covered through:

- Modifications
- Incident support

- Service requests
- Professional Services

# Why customers trust us with their Managed Cloud Services



Over 4 decades of experience delivering enterprise class managed services – **it's in our DNA**



**500+ professional certifications** for AWS, Azure, Google, Emerging Technology



**ITSM Integration** – optional deeper workflow alignment



Bank of Hours for Professional Services – **velocity, efficiency**



**Our customers can scale faster** because they don't have to worry about how they will manage “Day 2 Operations” in the cloud.



We **enable our clients to focus on managing their business applications** – while CGI does the rest



**Collaborative Tools** for clients to engage with CCSTs (Slack or Teams) – community and direct relationship with the delivery teams

# Data and AI Enablement



# CGI end-to-end Data and AI acceleration capabilities

Our mission is to *accelerate our client's data analytics journey* through modernizing enterprise data platforms and delivering more intelligence and automation that transform business.



## Analytics Assessments and Roadmaps

Evaluate architecture, tools, methodologies, talent, and/or use cases & deliver a go-forward plan and roadmap



## Data Warehouse Modernization

Implement or migrate leading cloud data warehouse platforms, including data pipelines and integrations



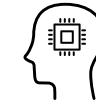
## Datalake and Lakehouses Industrialization

Design, build, govern an enterprise data lake environment to enable full-stack data capabilities & tools



## Business Intelligence and Reporting

Accelerate deployment of analytics and dashboards that tell stories and improve business processes



## AI and GenAI Enablement

Deliver high-value use cases, from early-stage prototyping to operationalization of complex AI/ML and GenAI

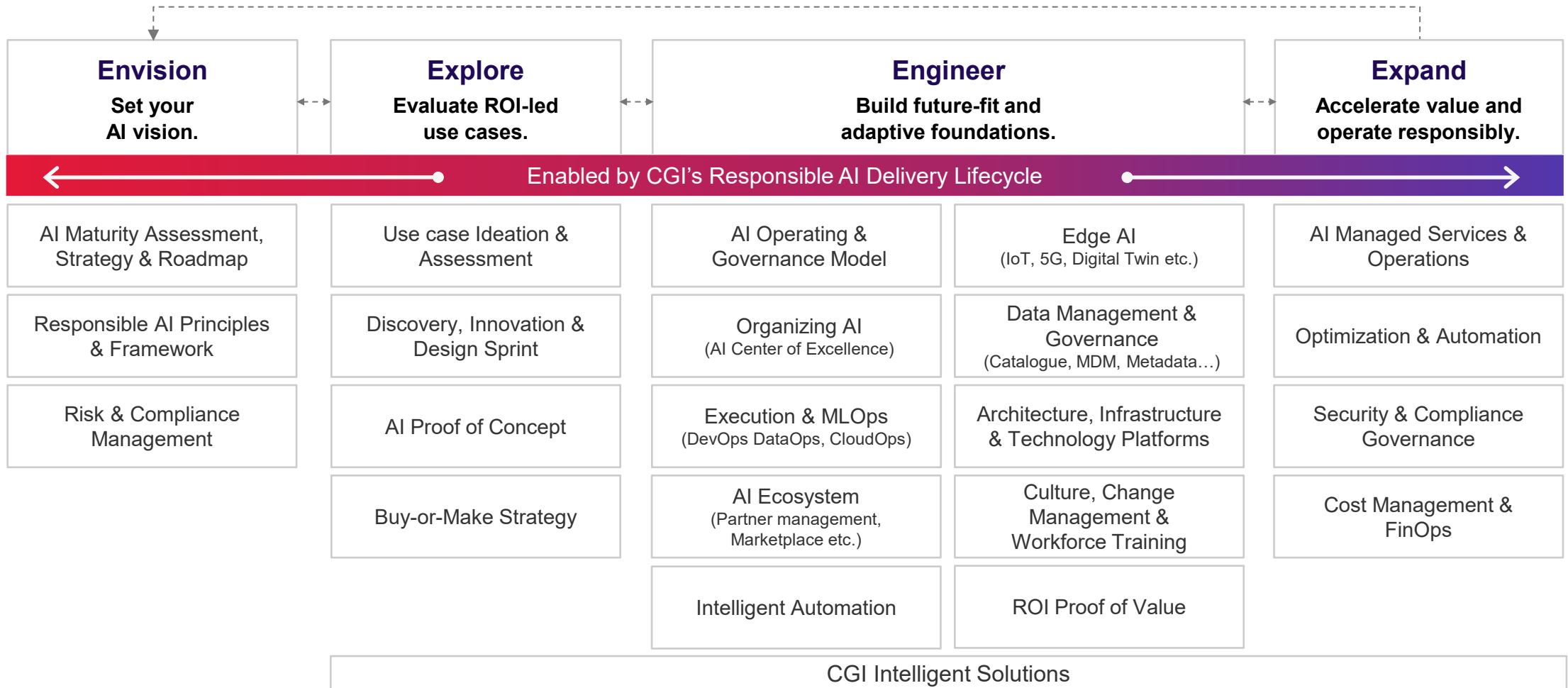


## Clean Data

Ensure high-quality and trusted data platforms through effective cleansing, cataloging, governance, and master data.



# CGI end-to-end AI and GenAI capabilities



Questions? Reach out to us!

John Cooper



Srini Venkataramaiah



# Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world.

We are insights-driven and outcomes-focused to help accelerate returns on your investments. Across hundreds of locations worldwide, we provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally.

**[cgi.com](https://www.cgi.com)**



# Appendix



# CGI Infrastructure Managed Services Standard Offerings

# CGI Infrastructure Service Offering Catalogue

## Managed Services

### AIOps: Predictive Insights, Proactive Solutions New

Leveraging advanced AI and machine learning capabilities to leveraging advanced AI and machine learning capabilities

[Learn more](#) →

### Managed Middleware Services

Empower your organization with our expertise to ensure your systems are up-to-date, securely configured, and optimized, enabling you to achieve a competitive edge in today's fast-evolving technological landscape.

[Learn more](#) →

### Managed Detection and Response Service New

Enhances your organization's cybersecurity by providing 24/7 protection through advanced AI and expert analysis.

[Learn more](#) →

### Major Incident Management

Taking Control of Your Major IT Outages, Letting You Focus on Daily Operations

[Learn more](#) →

### Workforce Management as a Service

Reduce client and employee frustration and improve satisfaction by staffing your contact center to align with contact volume and business outcomes.

[Learn more](#) →

### Managed Cloud Services

Focus on your migration-at-scale efforts while we manage your day-to-day cloud operations.

[Learn more](#) →

### Managed Disaster Recovery Services

Designed to not only automate IT processes but to also drive efficiencies and results oriented outcomes for you.

[Learn more](#) →

### Managed Microsoft Sentinel (SIEM)

Enables your organization to manage day to day security operations and assist your organization to make informed decisions related to your current security landscape

[Learn more](#) →

### Managed PMO Service

Offering clients a streamlined governance and flexible delivery approach to effectively manage large and complex projects, guaranteeing high-quality delivery and execution

[Learn more](#) →

# CGI Infrastructure Service Offering Catalogue

## Managed Services

### Managed Technical Service Desk

Reduce client and employee frustration and improve satisfaction by staffing your contact center to align with contact volume and business outcomes.

[Learn more](#) →

### SKYDiscovery Asset Management Platform New

Empowers organizations to enhance operational efficiency, meet compliance demands, and drive informed, strategic decisions.

[Learn more](#) →

### Robotic Process Automation as a Service

Designed to not only automate IT processes but to also drive efficiencies and results oriented outcomes for you

[Learn more](#) →

### SKYPortal Automation Platform

Reduce client and employee frustration and improve satisfaction by staffing your contact center to align with contact volume and business outcomes.

[Learn more](#) →

### Stratus+ IaaS

Provide on-demand access to a robust, scalable, fully auditable IT Infrastructure as a Service.

[Learn more](#) →

### Unify360 Hybrid IT Management Platform

Enabling you to consume IT at the velocity your business moves, allowing you to focus on innovation

[Learn more](#) →

### Workforce Management as a Service

Reduce client and employee frustration and improve satisfaction by staffing your contact center to align with contact volume and business outcomes.

[Learn more](#) →

### Managed Microsoft XDR Security Service New

Empower your organization with our expertise to ensure your systems are up-to-date, securely configured, and optimized, enabling you to achieve a competitive edge in today's fast-evolving technological landscape

[Learn more](#) →

### End User Services

Allow your hybrid workforce to be more productive enabling you to focus on your organization's high priority goals.

[Learn more](#) →

# CGI Infrastructure Service Offering Catalogue

## Managed Services

### Device Management & Engineering

Modernize your workplace and manage anything, anywhere using the guidance of CGI.

[Learn more](#)



### Managed Apple Services

CGI's Managed Apple Services closes the gap for enterprise environments, bringing our clients in line with Apple device management best practices.

[Learn more](#)



### Site Reliability Engineering New

CGI enables organizations to evolve their SRE maturity model at their own pace, embedding best practices into their technology landscape for sustained success.

[Learn more](#)



### Cloud Migration Services New

Leveraging a proven, end-to-end framework, CGI provides a seamless cloud migration service.

[Learn more](#)



### Managed Modern Contact Center Services New

AI Powered. Future-Ready Support. Designed for Users Our Managed Modern Contact Center Services leverage cutting-edge AI and automation, omnichannel flexibility, and expert human touch to provide seamless, user-centric support.

[Learn more](#)



### Tech Hub & Workplace Services New

CGI's Tech Hub & Workplace Services transforms the workplace with consistent, personalized support across all devices, locations, and collaboration platforms.

[Learn more](#)



# CGI Infrastructure Service Offering Catalogue

## Projects & Assessments Services

### Technical Advisory Services New

We leverage modern methodologies and our skilled expertise to maximize value for clients. We are driven by a passion for quality and client success.

[Learn more](#) →

### Asset Management Consulting

Giving clients greater visibility to their asset inventory, a cornerstone to many other functions – yielding optimization opportunities and financial savings across lines of business

[Learn more](#) →

### Application Security and Threat Emulation (ASTE)

Identify vulnerabilities, reduce risk, and ensure compliance across your organization with CGI's penetration testing and application security testing.

[Learn more](#) →

### Cloud Migration Assessment

Have the confidence that our assessment will allow you to successfully migrate to a stable and supportable cloud environment.

[Learn more](#) →

### Cloud Migration Services New

Leveraging a proven, end-to-end framework, CGI provides a seamless cloud migration service.

[Learn more](#) →

### Contact Center E2E Advisory Services

Helping you address your technology needs to enhance your ability to deliver outstanding customer care experiences.

[Learn more](#) →

### FinOps: Transformative Financial Optimization

Elevate your financial operations with CGI's FinOps services, optimizing costs and boosting governance in your cloud environment

[Learn more](#) →

### Infrastructure Technology Plan

Providing you with full visibility into the level of obsolescence, compatibility and vulnerability of your infrastructure

[Learn more](#) →

### Mail Migration Service

Ensure that your critical mailbox data is migrated securely from one legacy domain to a new infrastructure.

[Learn more](#) →

# Sample AI Use Cases



# Payroll Case Processing Automation

Agentic

# Using AI agents based GenAI solution to reduce the backlog of payroll cases for a government client

## CASE STUDY

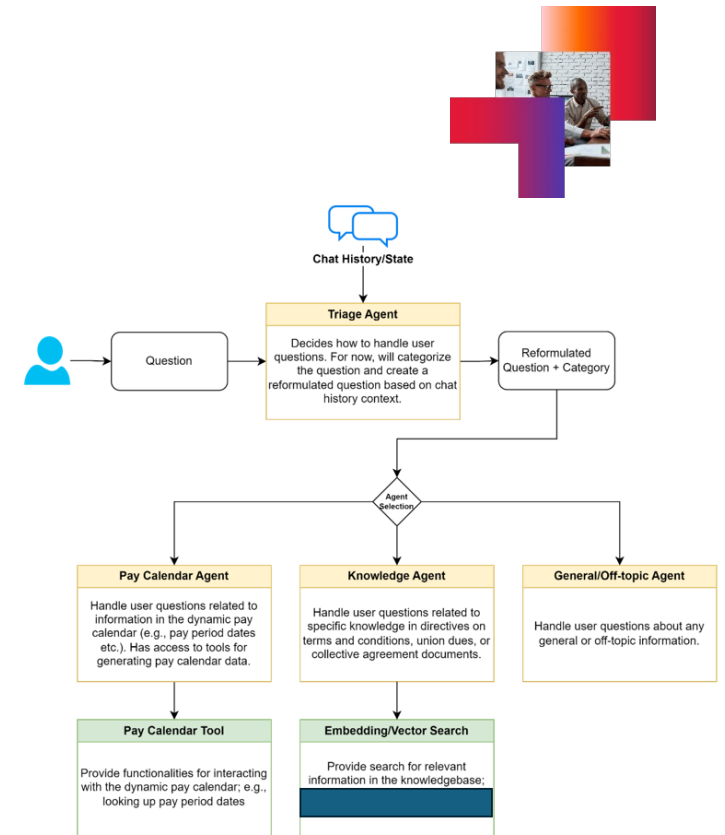
The client was the payroll department at a large government client and faced a **significant backlog of about 400,000 employee compensation cases** that required resolution by advisors. The **cases involved multiple years of employment, requiring in-depth research into historical documents and pay tables**. Cases often took **over a year to resolve**, with a median **resolution time of about 180 days**, and **inefficient case transfers between advisors** causing delays. Relied heavily on manual navigation across multiple disconnected tools and data sources, causing a substantial risk of errors.

**CGI developed a GenAI-powered, human-in-the-loop assistive solution.** This system leveraged **Large Language Models** deployed on **secure Virtual Machine infrastructure** to augment advisor workflows without replacing human judgment. The solution provided a centralized and efficient way for advisors to access and interpret relevant information, significantly reducing the time spent on manual research and calculations. The new system improved case management, streamlined information retrieval, and facilitated quicker, more accurate decision-making, ultimately helping reduce the backlog and enhance efficiency.

**Multi-agent design and reduced hallucinations:** The assistive solution operates as a **sophisticated multi-agent system**, with **interconnected AI agents** including agentic routines and handoffs between agents. To ensure **accuracy and reliability**, the solution incorporates structured generation controls **that reduce AI hallucinations**. The system handles complex multi-step information requests while maintaining accuracy and relevance.

**User Experience Design:** The user interface features an intuitive chatbot design, allowing compensation advisors to **quickly query information** from multiple sources including comprehensive **logging capabilities** and **robust feedback mechanism**.

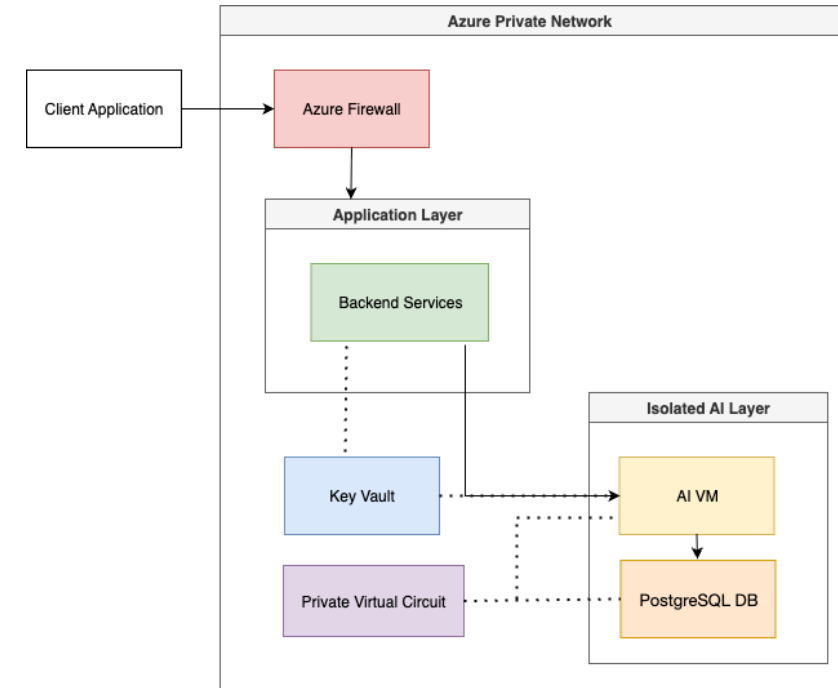
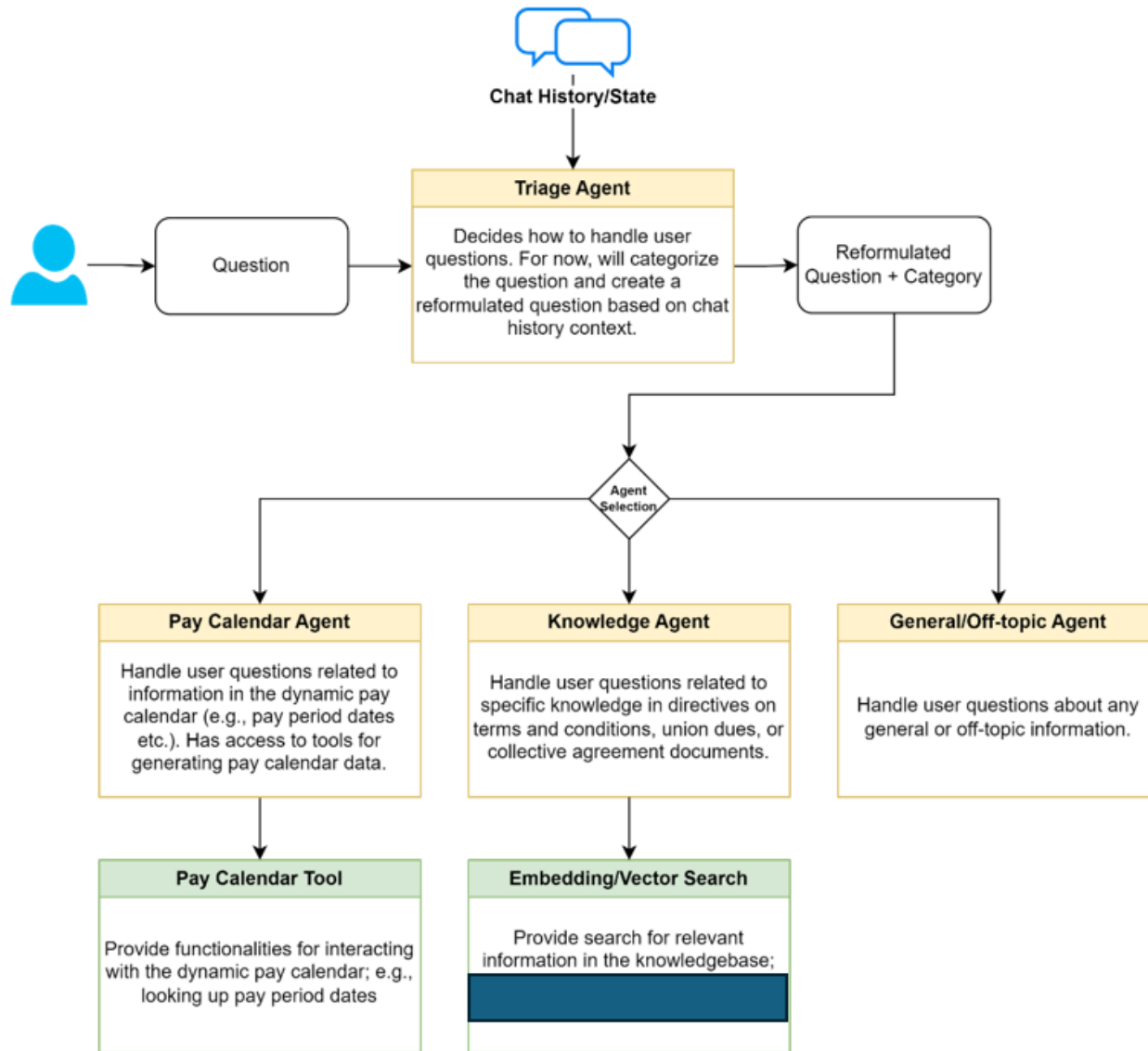
**Outcomes for the client:** The solution helps advisors **reduce the time spent searching** through multiple knowledge sources and process cases **more efficiently and with greater confidence**. The system also helps **reduce the training burden for new advisors** by providing them with an intelligent tool to quickly find relevant information and procedures..



**Generative AI; AI & Machine Learning; Conversational Agents; Data Management with unstructured data**

Country: Canada

Industry: Government



Open Source: LLaMA 3.1

- Open-source LLM with strong reasoning & safety
- Full control over updates, training, and behavior

**Network Isolation and Role Based Access Control**

- Private Virtual Network with no public internet exposure
- Private Endpoints for secure service connections
- Network Security Groups to enforce granular rules on network traffic
- Role-Based Access Control (RBAC) for least-privilege access
- Azure Active Directory integration for identity management

**Structured Generation with SGLang**

- We enforce a strict output schema (e.g., JSON) on the LLM. This eliminates formatting errors and prevents the model from generating unstructured, potentially hallucinatory text.

# Why Open Source ?



## Foundation Model: LLaMA 3.1

- Open-source LLM with strong reasoning & safety
- Full control over updates, training, and behavior
- No external API or vendor dependency



## Development Frameworks (e.g., SGLang)

- Community-supported, modular tools
- Structured output, better error handling
- Transparent & debuggable pipeline



## Privacy & Data Protection

- Data stays in secure, client-controlled environments
- No exposure to third-party APIs
- Meets internal compliance & governance standards



## Extensibility & Flexibility

- Fully customizable for business needs
- Avoids vendor lock-in; portable across platforms
- Seamless integration with existing systems



## Networking & Portability

- Runs in containers (Docker, K8s)
- Easily migratable to on-prem or private cloud
- Supports air-gapped & isolated deployments

# Privacy and Network Security

## Network Isolation

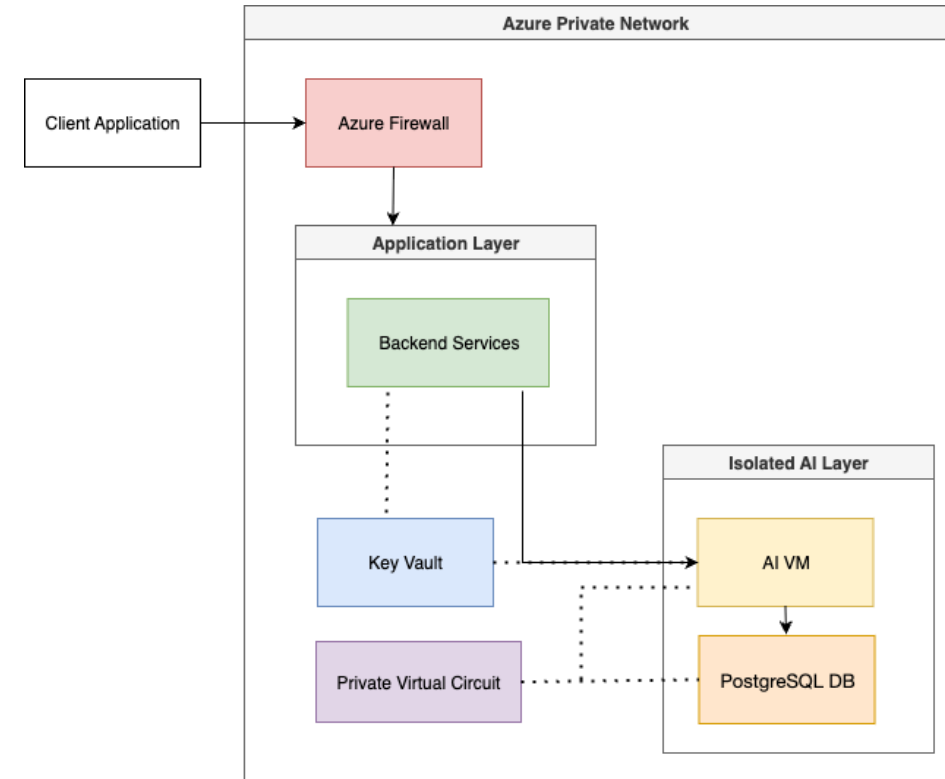
- Private Virtual Network with no public internet exposure
- Private Endpoints for secure service connections
- Network Security Groups to enforce granular rules on network traffic

## Access Control

- Role-Based Access Control (RBAC) for least-privilege access
- Azure Active Directory integration for identity management
- Just-In-Time access for administrative functions

## Data Protection

- End-to-end encryption for data in transit and at rest
- Customer-managed keys stored in Azure Key Vault
- Data Loss Prevention (DLP) policies for sensitive information



# Guardrails

## Prompt Engineering for Filtering

The Triage Agent uses prompt-based rules to immediately filter out irrelevant or inappropriate user questions before they are processed.

## Structured Generation with SGLang

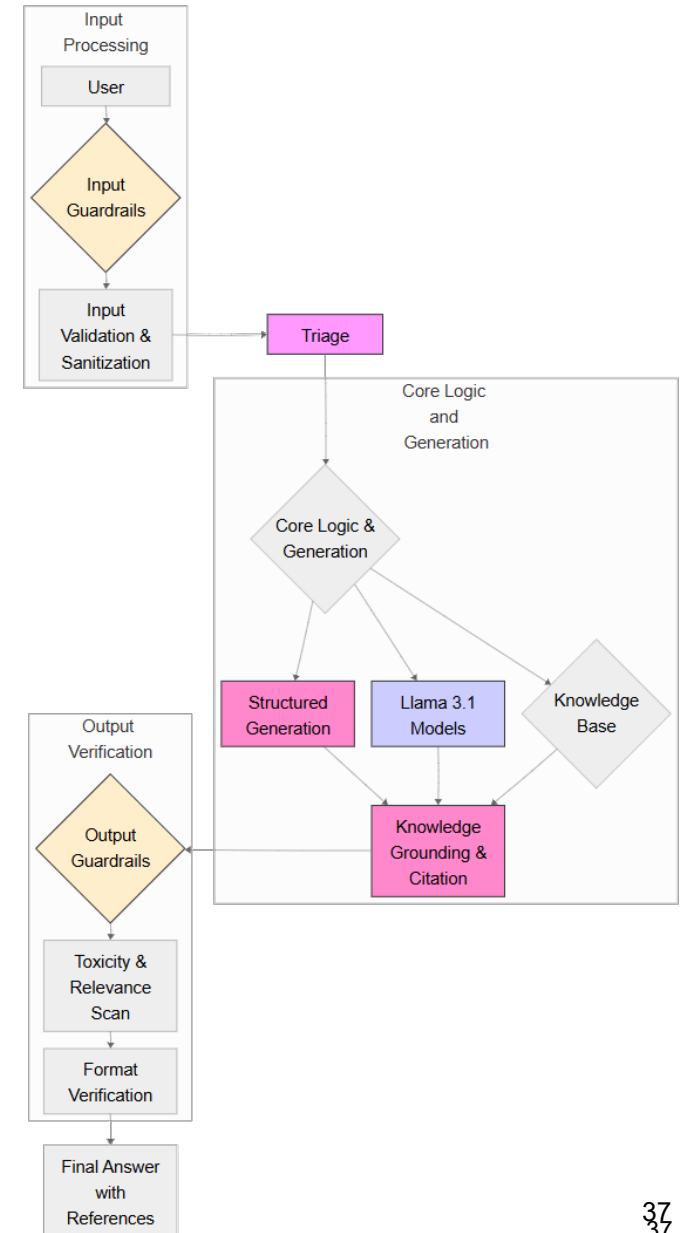
We enforce a strict output schema (e.g., JSON) on the LLM. This eliminates formatting errors and prevents the model from generating unstructured, potentially hallucinatory text.

## Foundation Model

Utilizes the Llama 3.1 model, which has undergone extensive safety training to provide a strong baseline of helpful and harmless behavior.

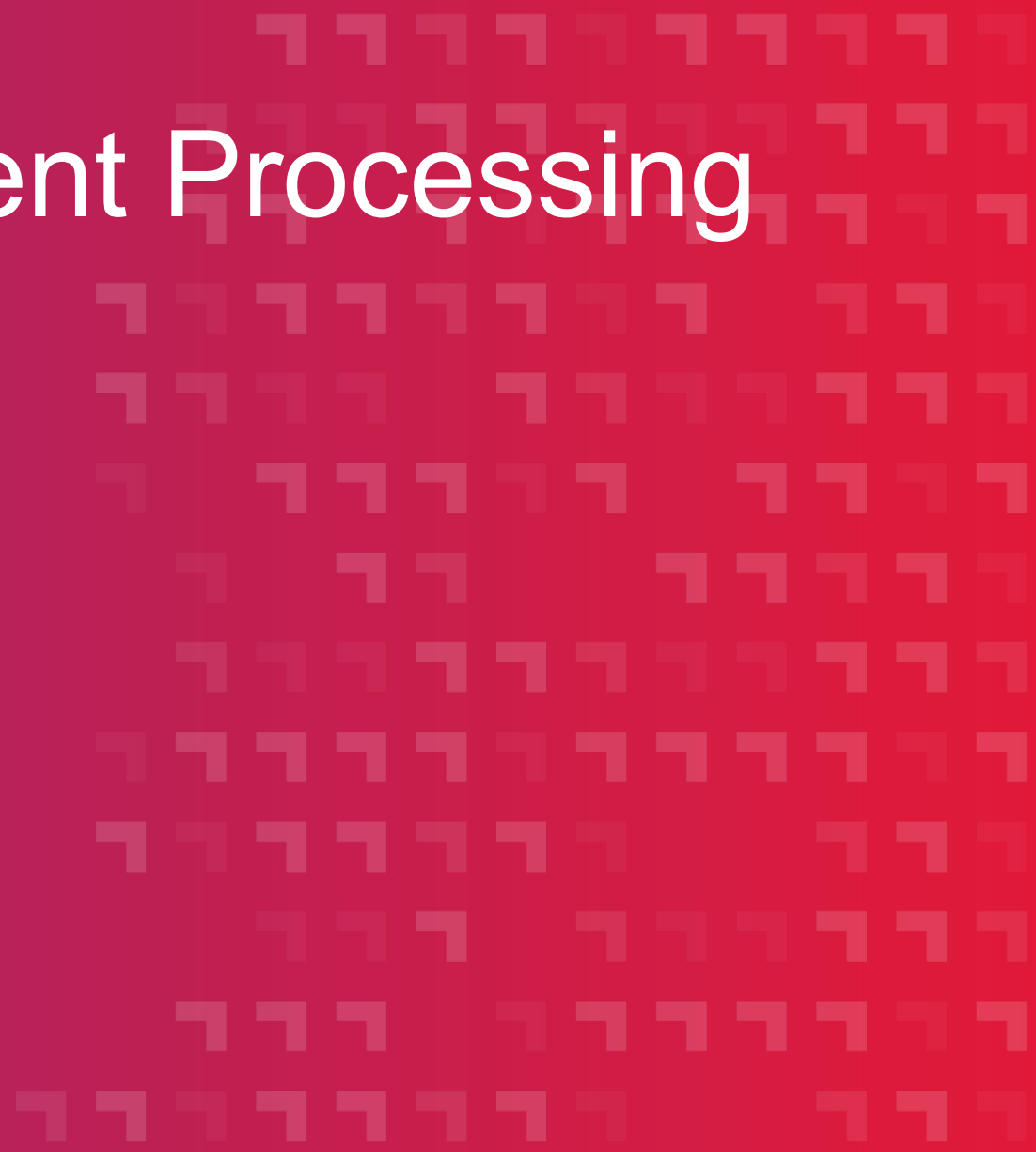
## Answer Referencing & Citations

All answers from the Knowledge Agent are grounded in retrieved documents. The system must cite its sources, preventing hallucinations by ensuring verifiability. If no source is found, it will not invent an answer.



# Cost Effective Document Processing

Agentic



# 2

## Using AI agents for intelligent and cost-effective multi-variate document processing for a government client

### CASE STUDY

The client was the payroll department at a large government client and faced a significant backlog of about 400,000 employee compensation cases that required resolution by advisors. The cases involved multiple years of employment, requiring in-depth research into historical documents and pay tables. Cases often took over a year to resolve, with a median resolution time of about 180 days, and inefficient case transfers between advisors causing delays. Relied heavily on manual navigation across multiple disconnected tools and data sources, causing a substantial risk of errors.

**Key challenge** was manual fetching of information from a wide and complex variety of documentation - **having multiple kinds of forms, emails, screenshots, handwritten and/or scanned documents.**

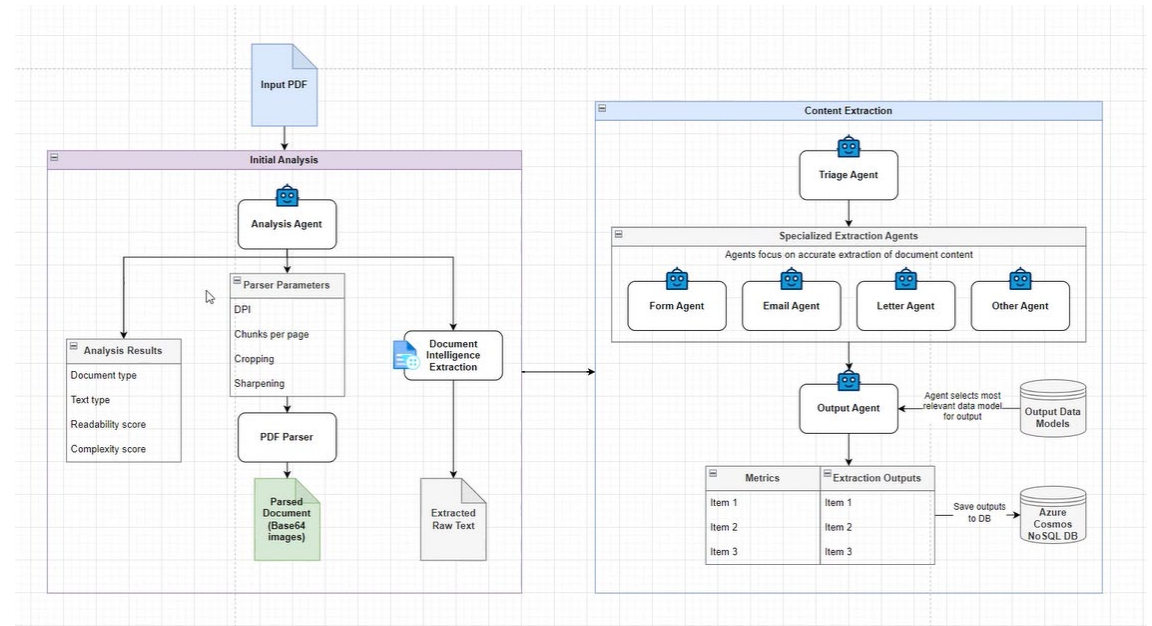
Gathering manual information from forms needed time for human agents. And there was human level variation in capturing this information from forms. Traditional OCR could help but it has its flaws – didn't always getting high quality results (issues with checkboxes being ticked, handwriting etc.) and cost of always using Document Intelligence AI service even if the form can be processed with a python OCR library.

CGI is developing a **Multi-Agent System** on the **Azure AI Foundry platform** to **automate intelligent document processing**. The system uses a team of specialized AI agents to analyze, triage, and extract information from various documents (PDFs), outputting structured JSON data into Azure Cosmos DB for downstream use. We tackled this by building an Agentic AI solution with an initial **Analysis Agent** that detects what path of processing needs to be triggered depending on the Document Type, Complexity and Readability. Upon a decision being made, the Analysis Agent routes this to a **Triage Agent** to distribute the processing request to **custom agents for Emails, Handwritten Forms, Typed Forms etc.**

Country: Canada

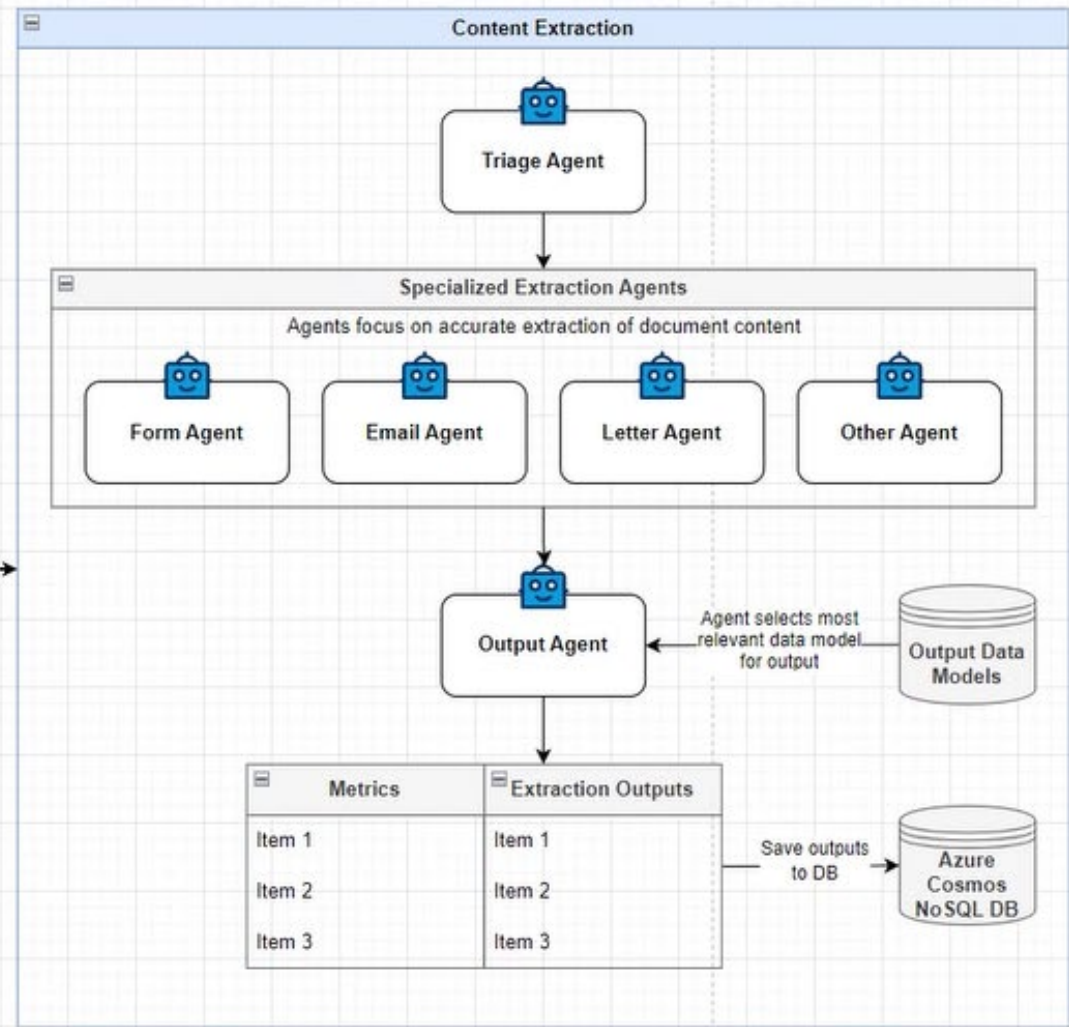
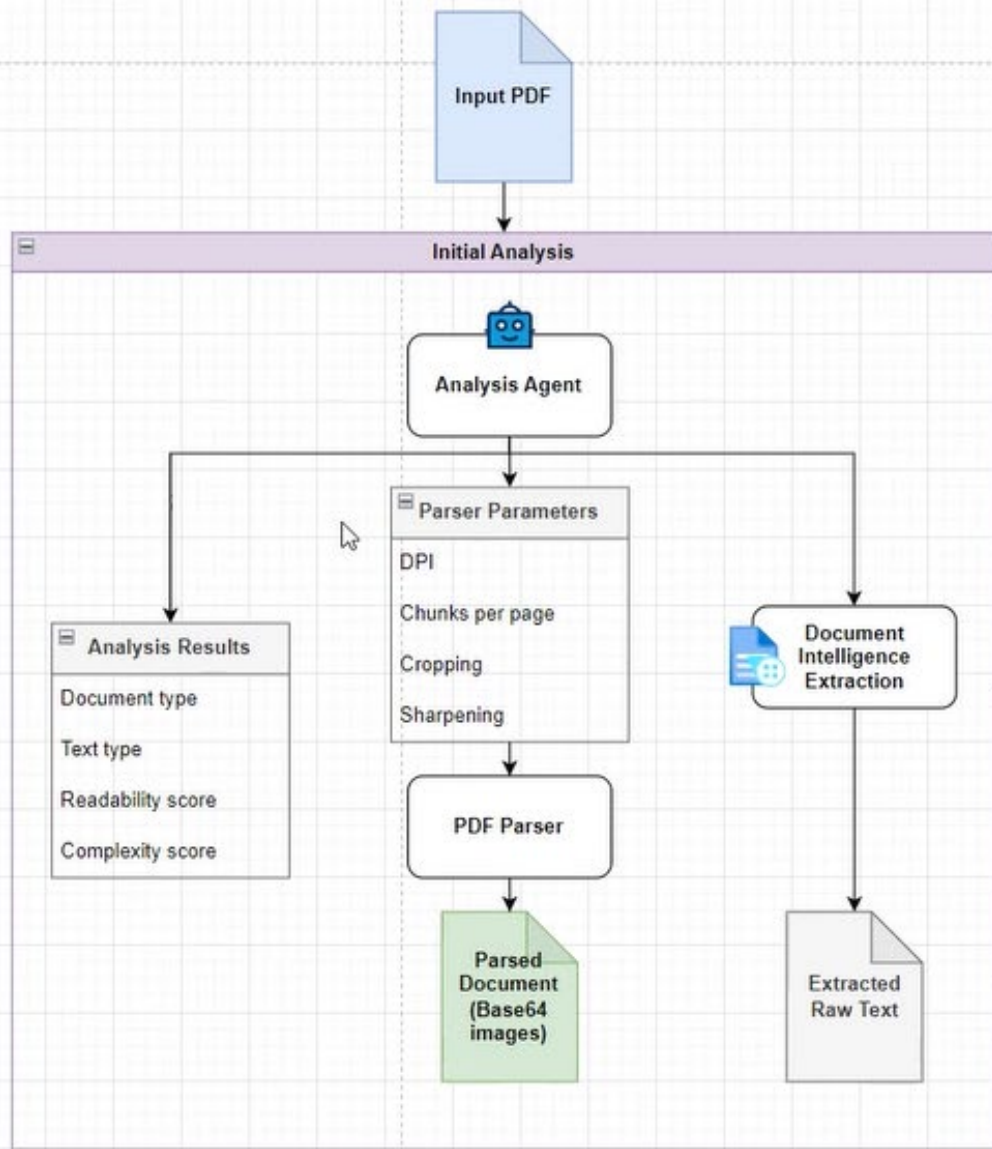
Industry: Government

**Generative AI; Agentic AI, AI & Machine Learning; Conversational Agents; OCR; Data Management with unstructured data**



### Key outcomes:

- Time and Effort savings
- Accuracy gains by using a hybrid OCR approach based on document types
- Cost reduction by intelligent routing of processing requests
- Custom QA validation checks based on Document Types and client requirements



# Scrum AI Master

Agentic



# Scrum Master AI Overview

## Context:

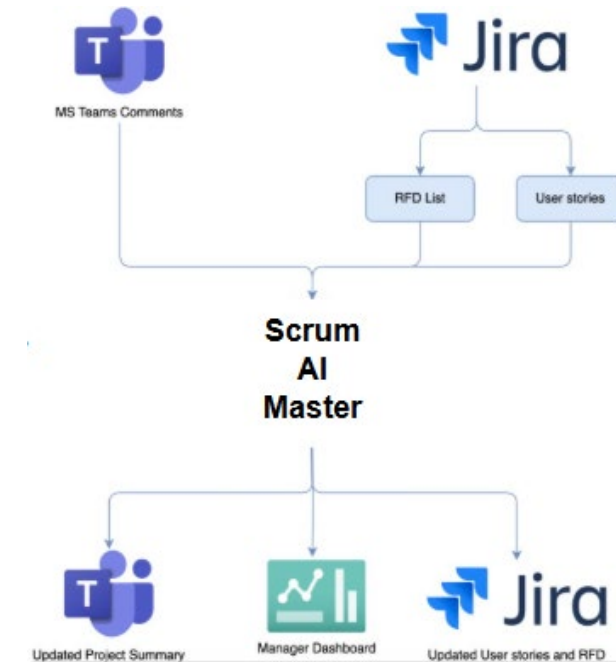
The client managed multiple projects with varying team sizes and a limited number of Release Train Engineers (RTEs), who were responsible for ensuring projects stayed on track, reporting to Product Owners, and handling repetitive tasks such as stand-ups, reporting, and story creation.

## Goals :

- **Accelerate Project Delivery:**
  - Improve sprint predictability to enable faster delivery of projects.
- **Enhance RTE Productivity**
  - Automate routine tasks (e.g., stand-ups, reporting, story creation) by converting scrum chat into actionable insights for the team and the PO.

## KPIs:

- **Commitment Reliability:** Ratio of stories completed to stories committed, targeting  $\geq 80\%$  for 2–4 consecutive sprints.



# The Approach and Outcomes

## Inputs:

- Previous Jira board state
- Previous RFDs - Risks, Follow-ups, and Dependencies
- User comments on Microsoft Teams channels

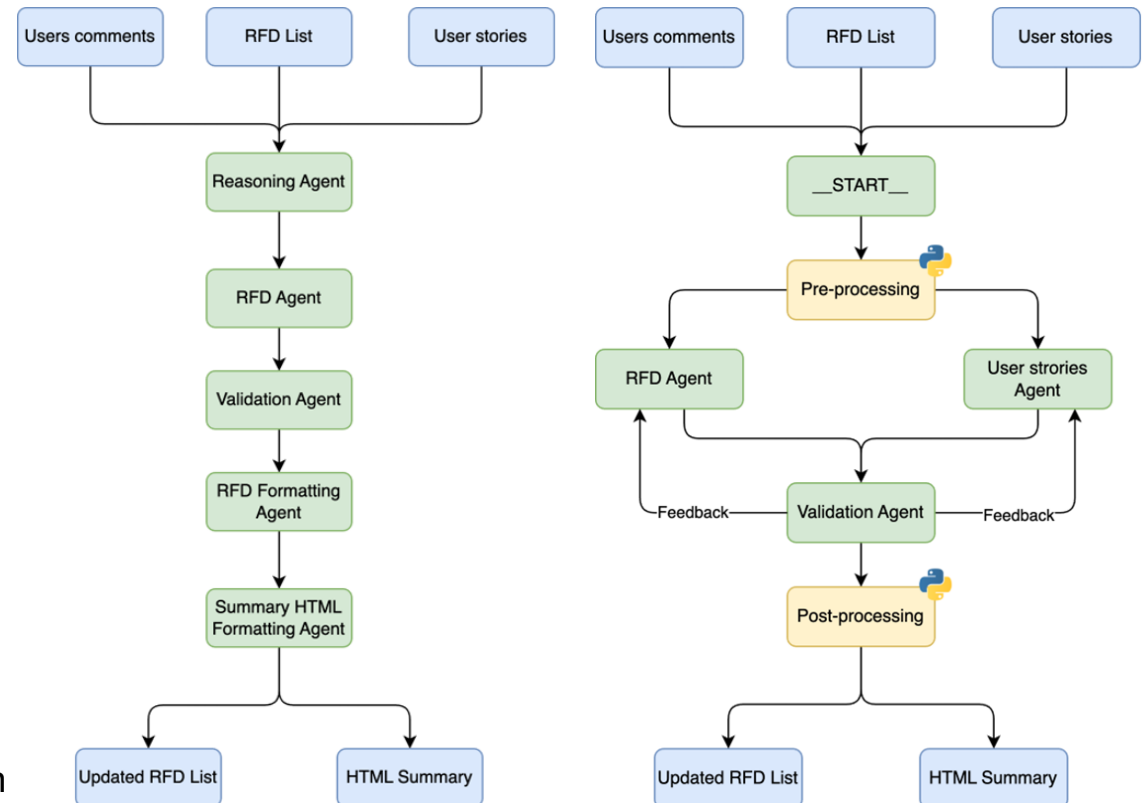
## Outputs:

- Microsoft Teams summary of project status
- Updated JIRA stories
- Updated Manager Dashboard

## Outcomes from initial production version:

- Employee feedback: efficiency gains for RTEs
- Employee experience enhancement (Less standup and sprint planning meetings)
- AI Scrum Master for small teams
- Adoption from 18 different projects in the initial production version
- Continuous feedback and improvements from actual working projects

## Initial Agentic Workflow → Latest Agentic Workflow



# Architecture

## Orchestration:

- Power Automate is used for workflow orchestration.

## Agentic Framework:

- LangGraph powers the agentic workflow.  
Previous approach: Autogen 0.2 (slower, lacked parallel processing).

## Environment Setup:

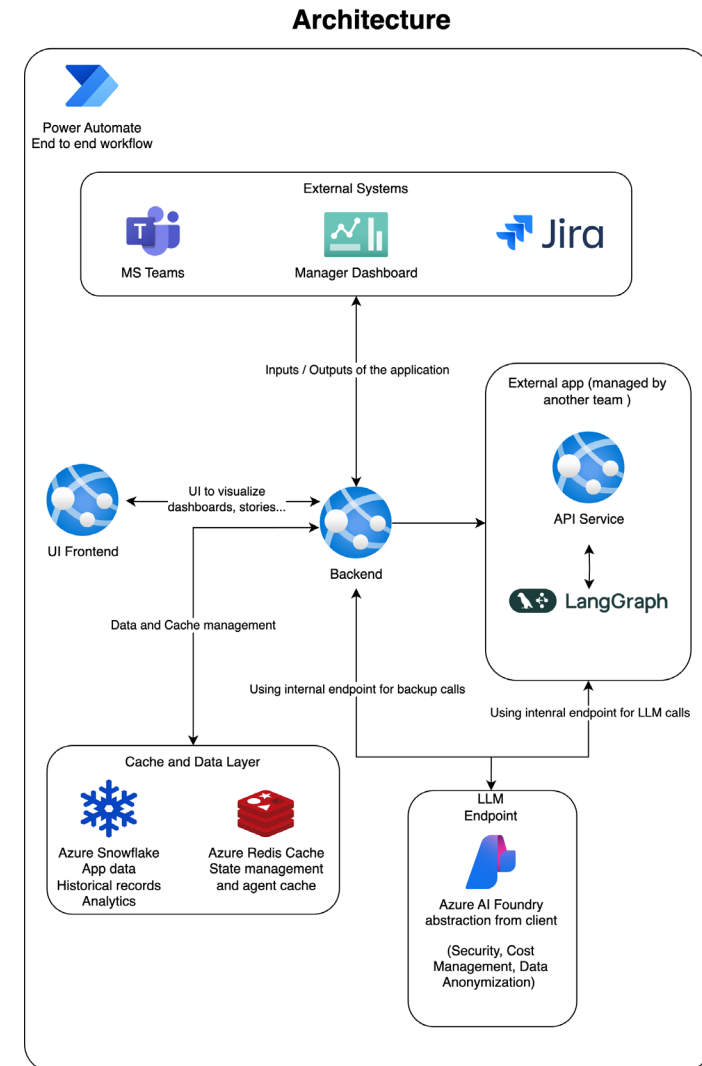
- Three environments: Dev, QA, and Prod.
- Unit tests executed individually.
- End-to-end tests run using test boards and beta Teams channel feedback.
- Beta reports generated for validation.

## Teams Involved:

- Data Engineers
- Backend & Frontend Developers
- Gen AI Engineers
- Power Automate Engineers

## LLM Integration:

- All LLM endpoints accessed via company-provided wrappers.



# Assisting with Legal Risk Assessment

GenAI (non-Agentive)

## CASE STUDY

# Automating Legislative Risk Assessment



The client is a major telecommunications & technology provider operating in a heavily regulated global environment.

The client was looking to transition from a reactive manual review of legislative bills to a proactive, continuous risk monitoring system. With new bills constantly being passed, the organization faced significant financial penalties if specific rules were violated. The solution needed to digest complex legal data and present it in an accessible format for non-technical stakeholders.

CGI helped the client design and deploy a custom Risk Assessment Dashboard. The solution leverages Large Language Models (LLMs) to extract critical risk information from raw legislative text and serves it via a highly optimized backend. This allows business users to view aggregate "Risk Scores" and drill down into specific details, transforming static legal documents into dynamic, actionable intelligence.

### Challenges:

- Navigating ambiguous requirements to define a concrete product roadmap and features that aligned with end-user workflows.
- Planning ahead to coordinate dependencies within a complex technical environment involving multiple diverse development teams.
- Remediating configuration issues within the existing Snowflake environment to support heavy data loads.

### Implementation

- Backend Robustness: Engineered a resilient backend architecture by implementing strict query timeouts and comprehensive exception handling to prevent system failures and ensure clear, user-friendly error messaging.
- Data Optimization: Implemented query caching and performance tuning within Snowflake to maximize efficiency and reduce latency for data retrieval.
- AI Integration: Developed a pipeline to ingest and process legislative data using LLMs, creating a continuous feedback loop of risk intelligence.

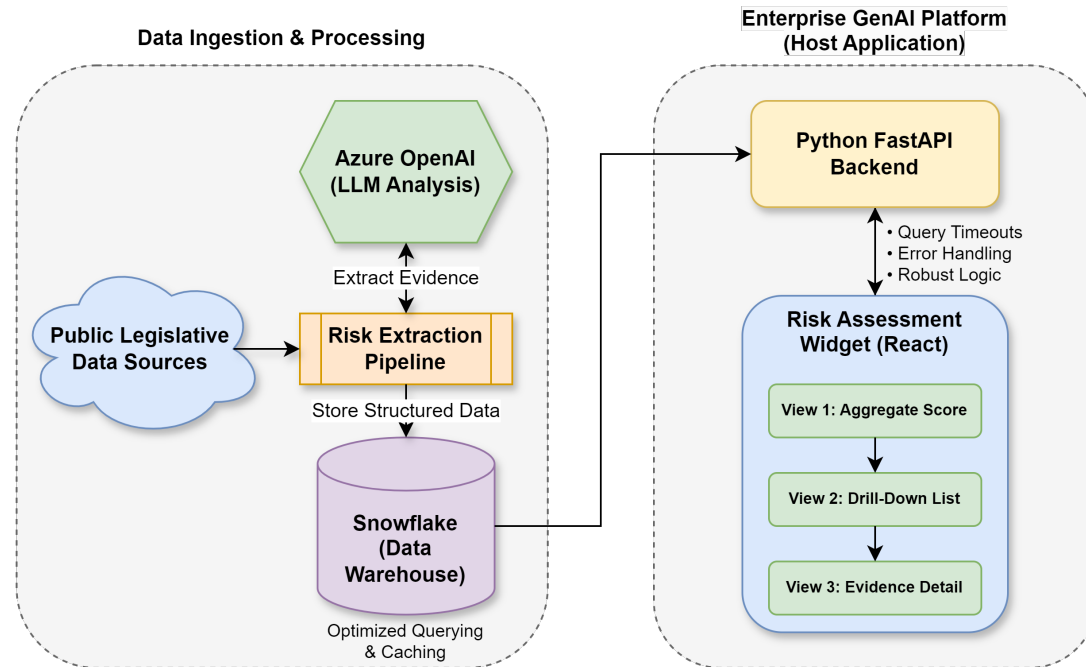
**Snowflake, GenAI / LLMs, Full-Stack Web Development, Python**

Country: USA

Industry: Telecommunications

## CASE STUDY

# Automating Legislative Risk Assessment



## Data & AI Processing:

- **Ingestion:** Public legislative data is processed via Azure OpenAI to extract evidence, penalties, and risk levels.
- **Storage:** Structured results are stored in Snowflake, optimized with query caching to minimize latency.

## Backend Reliability (Python FastAPI):

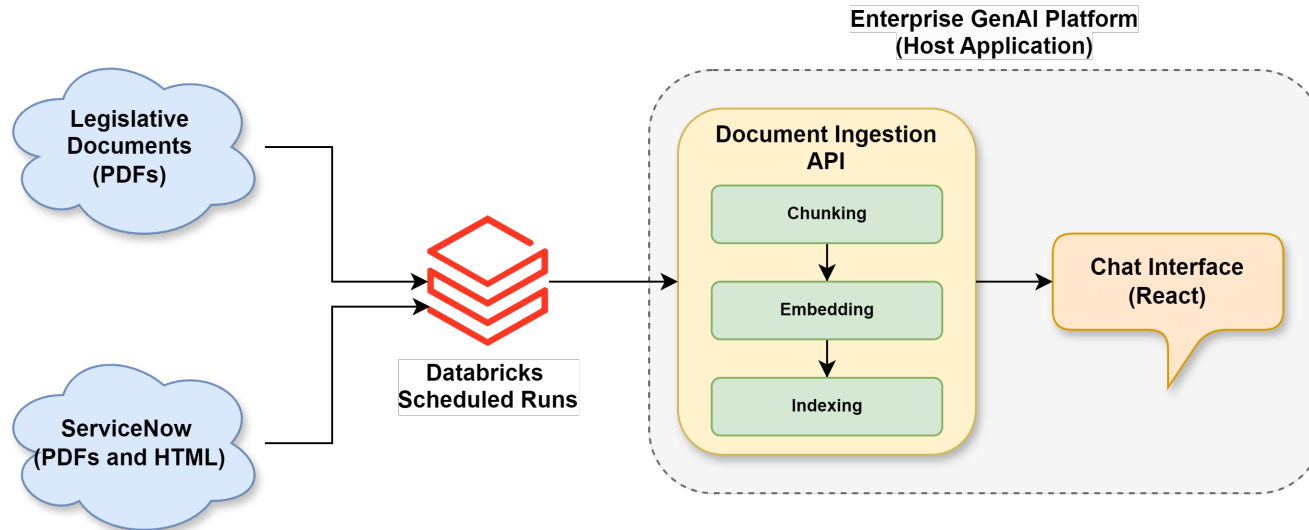
- **Robustness:** Implemented strict timeout logic to prevent database hangs.
- **Error Handling:** graceful failure management ensures user-friendly error messaging rather than system crashes.

## Frontend Experience:

- **Integration:** Deployed as a "Micro-Frontend" widget within the client's larger enterprise ecosystem.
- **Interactivity:** Supports multi-tier views: Executive Summary → Bill List → Deep-Dive Evidence.

## CASE STUDY

# Automating Legislative Risk Assessment



## Document Ingestion for Retrieval-Augmented Generation

- **Automated Ingestion:** Architected scalable Databricks pipelines to automatically ingest legal documents (PDFs, HTML) from both external legislative repositories and internal enterprise systems (ServiceNow) using platform APIs.
- **Continuous Synchronization:** Implemented scheduled workflows to ensure the LLM's knowledge base remains continuously updated with the latest legislative changes and internal policies without manual intervention.
- **Powering Conversational AI:** Transformed static, siloed documents into a dynamic knowledge foundation, directly enabling the frontend chat interface to deliver accurate and up-to-date, context-aware answers to non-technical stakeholders.

# Responding to External Customer Queries + Internal Org. Research

GenAI (non-Agentive)

# Using GenAI to responding to external customer queries and execute historical research for rulemaking at a payment standards body

## CASE STUDY

The client is a large payments rules and standards making body in the US. They are responsible for making rules and guidelines for payment processing operators, brokers and financial institutions to follow. There were two unique challenges:

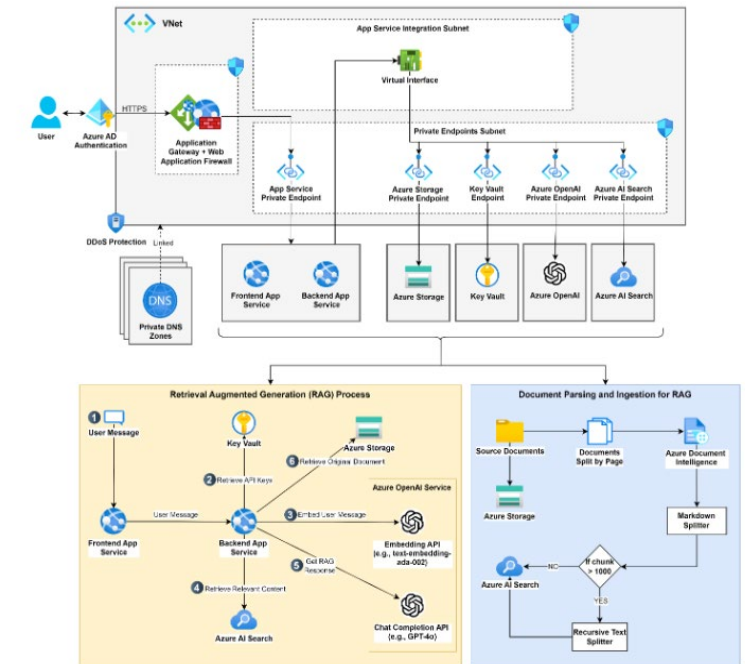
- external customers like banks and financial institutions requested clarifications on rules and guidelines from the client SMEs, and SMEs from **client side had to respond to them in a timely manner**. This involved **manual data lookup from multiple documents** and **curation of customer response**
- new rules making process was cumbersome and they had to often lookup **historical information going back 10-15 years** to create new rules with citations

**CGI developed GenAI based RAG implementation solutions that helped the SME team and agents at the client organization to chat with the chatbot to get curated responses and send responses to the external customers and financial institutions. The solution looked at historical information dating back to multiple years and expedited the creation of new rules. CGI solution used LLMs to rephrase questions and propose similar questions** to end users for ease of user experience by building:

- **Intent and Entity Focus:** Identify user's primary intent and the subject of their question
- **Simplification and Precision:** Focus on removing ambiguity while maintaining the essence
- **Contextual Enhancement:** Add relevant details to improve the question's focus

**Market intelligence and acuity:** CGI helped research multiple secure GenAI architectures and chose the one that suited the unique needs of the client.

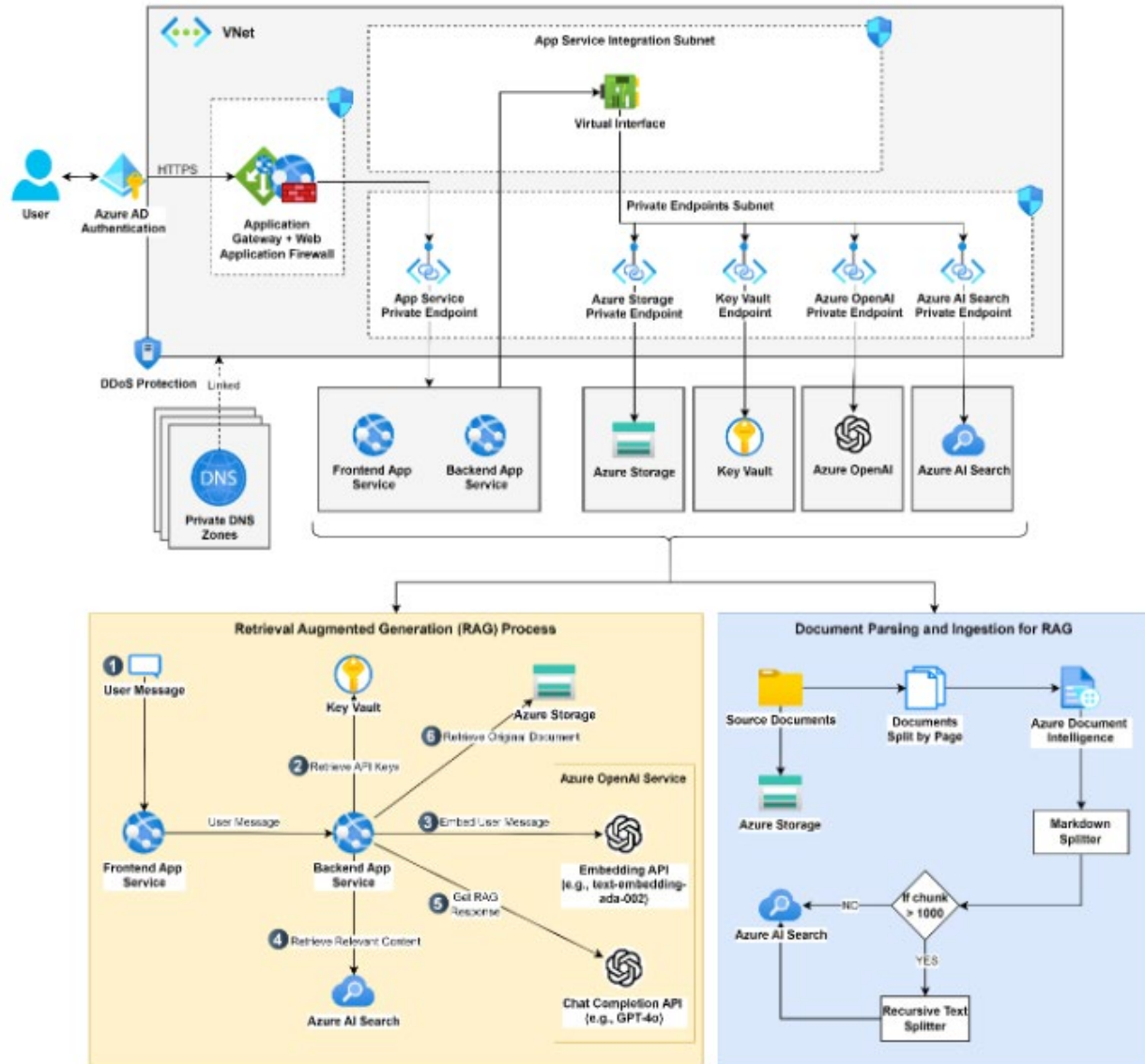
**Outcomes for the client:** The client loved CGI's work and is now using these solutions to do central research for internal projects and rules making. This gives productivity gains, more standardized responses and enhanced customer satisfaction, all by using repeatable GenAI architectures, and cost effectively achieving scale with AI.



**Generative AI; AI & Machine Learning;  
Conversational Agents; Data  
Management with unstructured data**

Country: North America  
Industry: Regulatory

# CASE STUDY



# Lessons Learnt Chatbot for PMOs


CGI Internal – GenAI (non-Agentive)

# CGI's own WisdomAssist to enhance project delivery for clients

## CASE STUDY

**CGI** **Wisdom Assist**

Clear chat

  
**Wisdom Assist**  
Powered by GTO Canada - Emerging Technologies

What are common mistakes during transition out processes?

Show all projects with AgileInfra infrastructure issues.

Suggest recommendations for projects managing Data Centre Closure?


**CONFIDENTIALITY NOTICE**

By using Wisdom Assist, you acknowledge that AI-generated summaries are confidential data subject to same security and confidentiality as original documents. Use is limited for internal CGI employees for insights on lessons learned; other use is not permitted. Always validate responses with citations to ensure accuracy.

[Accept](#)

Choose Knowledge base: GTO Lessons Learned ▼

Type a new question (e.g. What are the projects with unexpected delays?) ▶

 Contact us!

# Contact Centre Helpdesk Assessment – Finding AI Automation Opportunities

GenAI (non-Agentive)



# Enhancing Customer Onboarding with AI

Traditional AI

# Machine Learning driven QC augmentation in new customer onboarding at a large Financial Services client

## CASE STUDY

The client was a large global asset management firm in wealth management and financial planning and had been spending millions of dollars every year due to **inconsistencies in new customer accounts creation** process – this was because the Quality Control (QC) process had limited human team members to investigate new account opening forms. The QC team picked accounts opening **forms at random** and **lacked intelligence to identify the accounts most likely to fail** with issues. The issues faced were:

- QC process was random and missed a large number of new accounts with issues
- **Data was spread across disparate sources** and had an imbalanced dataset for model training
- Account opening forms had different templates coming in from various dealers

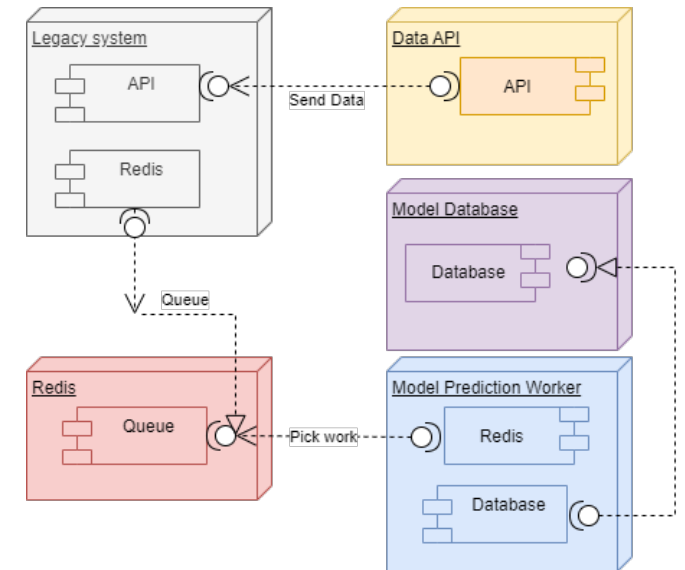
**CGI migrated the legacy data to cloud** and created a **ML-based Anomaly Detection solution** to identify accounts most likely to fail QC, thereby reducing cost and improving customer onboarding experience. ML implementation and solution deployment involved:

- **Data Collection and pre-processing**
- **ML deployment**
- Feature engineering
- Migrated the legacy system into a **microservices architecture**
- **Training and tuning models**
- Used a broker/message system to pass the messages
- Highly **scalable, AWS Cloud-native implementation**

**Market intelligence and acuity:** CGI researched multiple use cases that client competitors were using in QC augmentation and helped identify and MVP this use case first. Once MVP value was proven, we scaled the implementation on AWS.

### Outcomes for the client:

- **Reduced overall liability** due to fewer onboarding forms rejections
- **Improved customer onboarding experience**



**Traditional AI; AI & Machine Learning; Anomaly Detection; AWS; Data Engineering with structured data**

Country: Canada  
Industry: Financial