

Designing for Scalable AI Interactions in Financial Workflows

A Framework for internal AI Tool Integration at Van Lanschot Kempen

Msc. Design for interaction
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Problem

Internal AI features are inconsistent across teams, causing fragmented interactions and unclear governance.

Project goal

Design a **scalable framework** for integrating generative AI into the workflows of employees at VLK, promoting consistent, transparent, and effective AI interactions.

Key Research Finding

- Users have a positive attitude towards learning AI but struggle with creating good prompts. They think current AI tools have limited sources.
- AI is mainly used for writing, information search, and advice. User prefer varied AI tools for these scenarios.
- Users want relevant outcomes with minimal actions (*display > select > input*). They prefer AI closely aligned with the context and appreciate clear guidance.

**These finding based on 11 semi-structured interviews with 5 bankers, 4 relationship managers and 2 investment advisors.*

User journey

Define AI Features

 **Product Owners & Designers**

Use the **AI Selection Wizard** to scope and decide which AI features fit business goals.

Focus: Aligns functionality with compliance and value


Design with Components

 **Designers**

Use the **Component Library** to prototype new AI tools and ensure a smooth design handoff for development.

Focus: Ensures consistency, scalability, and transparent interaction patterns




Use in Daily Work





 **Bankers, Relationship Managers, Investment Advisors**

Use the new AI-powered tools for daily-work.

Focus: Improves efficiency, decision confidence, and client experience

Framework Design

-  **Design Principles** articulate the core values that underpin every component and interaction pattern.
-  **Component Library** provides a structured collection of interface elements.
-  **AI Feature & Component Selection Wizard** translates both the principles and the components into an interactive decision-support tool, guiding designers to find best component set.

 Human Control	<ul style="list-style-type: none">UI labels remind users that AI is an assistantProvide obvious stop or undo options. Any AI edit should be reversible. Users should be able to edit AI outputs.When AI suggests an action (like updating a record), require explicit user confirmation.
 Transparency	<ul style="list-style-type: none">Use labels or icons on content AI generated.Provide short explanations on how suggestions were formed (e.g. "Based on today's sales data, I suggest...").Avoid false precision or over-promising; the language should reflect if AI is unsure.Display source links or citations for factual info to let users verify claims.
 Clarity	<ul style="list-style-type: none">Use a clean, familiar UI layout (e.g. speech bubbles, timestamps, assistant avatars). Group related actions in menus or accordions. Use tooltips or expandable info icons to hide complexity (e.g. detailed settings or AI training notes) unless needed.Prioritize direct information presentation, reducing the need for users to navigate through multiple steps.All presented information is relevant and clearly sourced, allowing users to easily comprehend and trust the data.
 Actionable	<ul style="list-style-type: none">Use prominent buttons or quick-reply chips to guide user flow (e.g. "Apply" or "Explain more"). Offer easy regenerate or edit prompt options when answers are unsatisfactory.If the AI cannot answer, it should offer alternatives (like linking to help docs or human support).Embed easy feedback mechanisms (thumbs, star rating, quick comments) right in the UI. Prompt users to rate answers or flag mistakes, and automatically generate a revised response when requested.

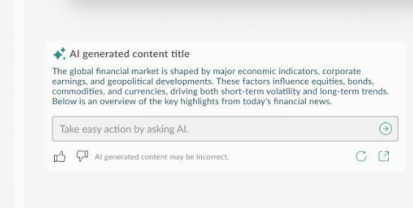
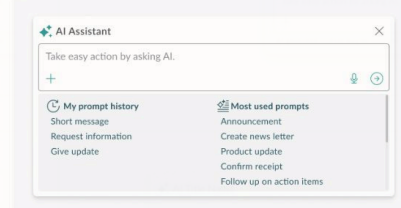
AI Panel Format

Below are four distinct AI Chat Panel formats, each tailored to different interface layouts and user needs.

- Embedded Inline usage** for quick, context-bound queries.
- Floating Chat Widget** when you need focus but don't want to lose page context.
- Docked Side-Panel** for ongoing, multitasking assistance.
- Full-Page AI workspace** for intensive, prolonged AI interactions.

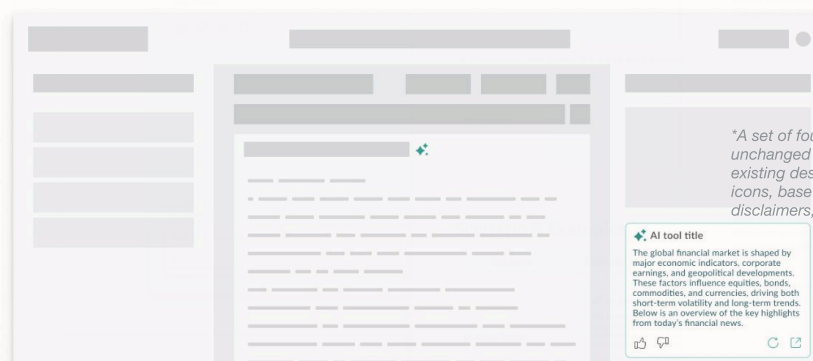
Embedded inline usage

- Best for quick Q&A related to the surrounding content without leaving the page; lightweight tasks like Summarize section, Improve writing or Define term.
- They are not effective for open-ended creative exploration or tasks that require broader contextual reasoning or multi-step logic.



Placement & Interaction

- Inline overlay prompts, such as in **Notion** and **Grammarly AI**, function as interactive, context-sensitive suggestions or actions that appear directly within the text or content area, enhancing user productivity and editing efficiency.
- Interaction see the **Inline AI usage** page. Use can view the AI-generated information directly on the page or open a floating overlay for easy interaction using the button.



**A set of foundational primitives adopted unchanged from Van Lanschot Kempen's existing design materials: fonts, buttons, icons, base input fields, tooltips, disclaimers, and modal window margins.*