

Designing for Scalable AI Interactions in Financial Workflows

Msc. Design for interaction
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A Framework for internal AI Tool Integration at Van Lanschot Kempen

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.

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

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.*

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.

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.

AI Feature & Component Selection
Find the perfect AI components for your project

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