



## Simplifying Bank Switching with Automation & AI



### Team Composition:

1 Senior Engineer  
1 Frontend Engineer  
2 Backend Engineers  
1 Project Manager



### Project Duration:

4 months (fixed scope)  
& 3 months support phase



### Tech Stack:

React  
.NET

## Project Overview

Cambifi uses **automation and AI** to drastically reduce the cost and complexity of switching bank accounts. By securely transferring data between checking accounts at different institutions, it empowers consumers and small businesses to move to better banking options effortlessly.

## Business Challenges

- **High switching costs** in time and money.
- **Complex processes** involving direct deposits and recurring payments.
- **User inertia** due to perceived hassle.
- **Risk-prone data migration** between financial institutions.

## Solutions Delivered

- **Automated Switching:** RPAs streamline the transfer of accounts, deposits, and payments.
- **Cost & Time Efficiency:** Drastically lowers switching barriers for users.
- **User-Friendly Process:** Simplifies transitions to encourage banking upgrades.
- **Secure Data Transfer:** Advanced encryption and validation ensure 99% accuracy and zero breaches.

## Results & Impact

- **40% reduction** in switching costs (time and money).
- **99% data migration accuracy**, with no security breaches.
- **Complete switching process in under 30 minutes.**

## Conclusion

- **Cambifi removes the hassle of switching banks with secure, automated processes**—saving users time, money, and effort. It's the smarter, faster way to upgrade your banking experience.