

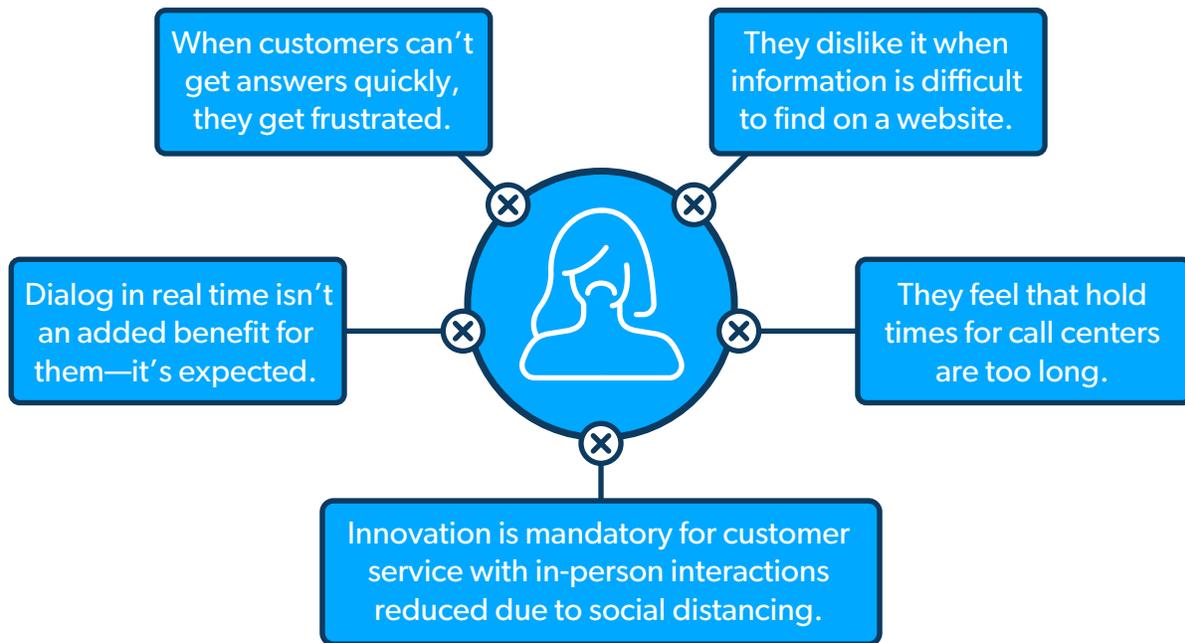
# CONVERSATIONAL AI



## Have more sophisticated conversations with your financial customers

Financial services & insurance marketers can now automate and enhance real-time intelligent messaging that delivers personalized customer experiences at scale. No more “robotic” chats with customers. Thinking machines with conversational messaging are intelligent, responsive and will enrich their experience and journey with your brand.

## MARKET CHALLENGES ARE YOUR OPPORTUNITY



## CONNECTED CONVERSATIONS

Conversational AI dialog with your customers can continue into other channels and messaging with enhanced personalization and customer experience



### EXPERIENTIAL

Natural fluid language dialog on the front end capturing consumer inquiries & insights



### DATA ORCHESTRATION

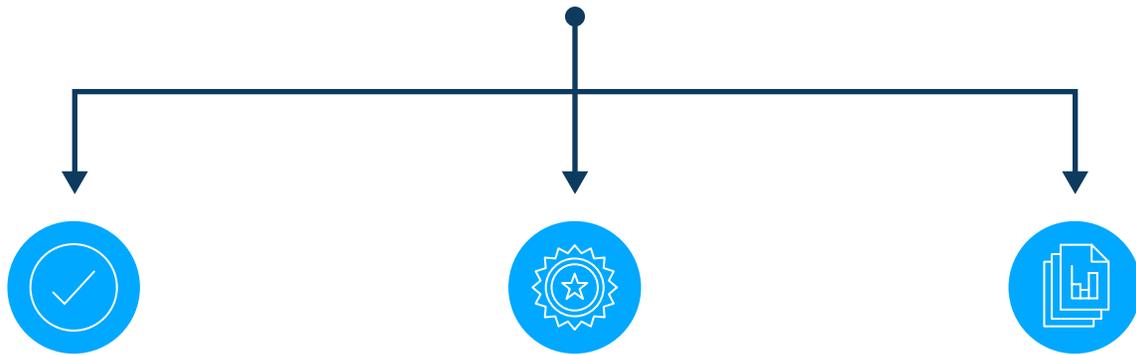
1st and 3rd party data combined with identity resolution and further enhanced with AI/ML



### PERSONALIZATION

Across multiple channels, customized from chat inquiry & updated profiles

# A KEY COMPONENT OF A BRAND'S DIGITAL TRANSFORMATION: MORE ADVANCED DIGITAL EXPERIENCES



## The new (updated) channel

- Complements the omnichannel universe
- Trend toward touchless service on the rise
- Automate conversations from the simple to the complex

## The always-on brand

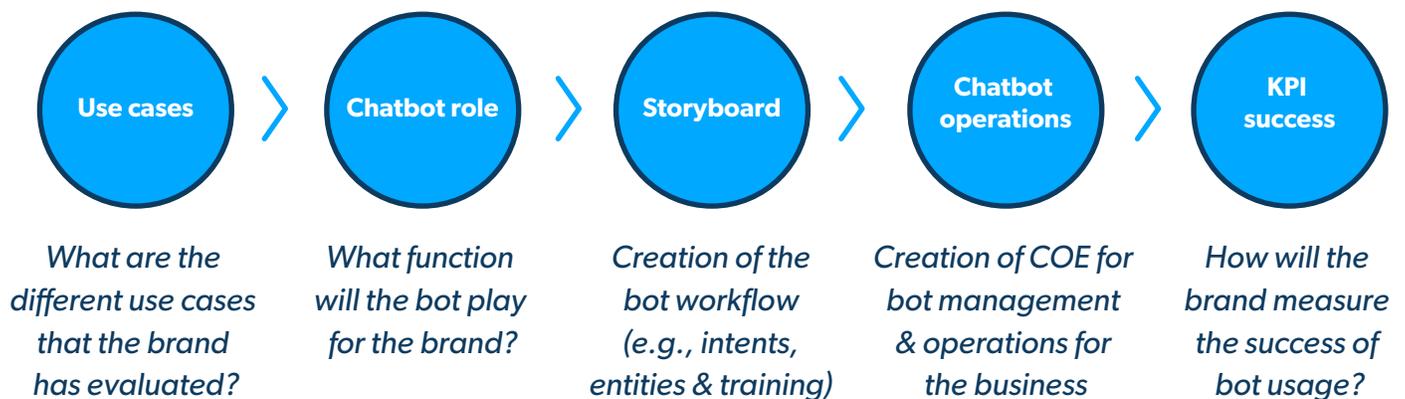
- Service can now be truly 24/7/365
- Converse with thousands of customers at the same time
- Qualify conversations to enable deeper interactions

## Enrich CX through data

- Capture rich data inputs beyond traditional methods
- Build richer customer identity, especially when customers are in market
- Enhance CX and satisfaction levels

## PLANNING METHODOLOGY

How we approach designing and delivering a Conversational AI solution:



## MARKET SUCCESS USE CASES



### Banking

- Managing your money
- New account setup
- Card & loyalty rewards management
- Alerts & notifications



### Wealth Management

- Portfolio inquiries
- Investing & research
- Planning advice
- NLP analyst research inquiries
- Robo-advisory services



### Insurance

- Claim activities
- Help away from home
- Policy quotes
- Onboarding new customers

## BRAND BENEFITS

**Brands that embrace Conversational AI can address multiple solutions and applications beyond any bot-like engagement. Three tenets of Conversational AI solutions are centered around business results:**



### Service

- Service efficiency
- Cost savings
- Customer satisfaction improvements
- Automate key steps of the customer journey



### Experience

- Always-on channel
- Enhanced digital experience
- Direct 1:1 dialog
- Increase brand loyalty



### Commerce

- Lead gen & qualification
- Personalized real-time offers
- Direct conversations
- Human handoff

**Are you ready to end to robotic chat features and give your customers real-time intelligent messaging that enriches their brand experience?**

**Start that conversation with us.**

Mark Sucese  
512 820 8974  
mark.sucesse@epsilon.com

