

KAI Business Banking

The Leading Conversational AI Solution for the Financial Services Industry

Kasisto's KAI Business Banking solution (KBB) handles the complexities that come with managing business banking activities.

Whether your clients are small business owners or large corporations, KAI helps you service & engage with them in a natural way while offering them contextual services. KAI provides immediate access to information, services & products including: cash positions, wire & ACH status, aggregate holdings, liabilities & more through human-like, intelligent conversations, 24 hours a day.

Critical & timely information can now flow effortlessly between your business banking platforms, & your customers. Powered by KAI, our Conversational AI platform, your business banking customers will experience frictionless account inquiries, reporting & cash management functions, freeing up your business representatives to focus on building more valued relationships with your corporate clients.

KAI Business Banking helps clients to achieve:

- An enhanced & engaging experience through contextual conversations
- Increased customer loyalty & deepened relationships through simplified digital engagement strategies
- Reduced operational costs by empowering customers to self-serve
- A futureproof virtual assistant platform to support authenticated user interactions

Servicing the Intricacies with Intelligent Conversations

I need my prior day 2+ projected AUD opening balance

K For prior day, in your AUD accounts you have a 2+ projected opening balance of AU \$XXmillion

Pending

KAI enables customers to complete complex tasks & navigate complicated portal interfaces conversationally.

Simplified Engagements That Do More

What is the last wire from Sutter Company to my account ending in 1801?

K Sure! Here are 3 matches. You have:
Account: 1801 MCA USD
Date: between 8/13/18 to 8/20/18
Matches: Wire

1,452.00 USD (Wire from Sutter Company) on 8/14/18
1,753.00 EUR (Wire to Sutter Company) on 8/14/18
1,195.00 BBP (Wire from Sutter Company) on 8/16/18

ts See credits Over \$2000 By Payee Show USD

Better understand account activities & payments, leverage investment products that help the corporate treasurer make better financial decisions & more effectively manage cash flow.

Build Business Relationships That Last

K Thanks for these details about your line of credit.
You've been in business for over 2 years and your annual revenue meets our requirements.

Would you like to make an appointment to apply over the phone or in-person?

I prefer a phone call.

K Great what day and time works best for you?

Product recommendations & offers via intelligent conversations not only work to decrease costs, but can also improve your client's perception that you actually understand their needs versus simply want to sell a product or service.

Every Conversation is Human-like & Intelligent

On day one, KAI is fluent in banking.

PRE-PACKAGED BANKING KNOWLEDGE SPEEDS TIME

MONEY MOVEMENTS

- Search bank, billing and/or liquidity transactions

BANKING VOCABULARY

- Explain banking terms & acronyms to improve financial literacy

NEW PRODUCTS & SERVICES

- Application process & eligibility

CARD SERVICING

- Activate, block or unblock card

TRANSACTION INQUIRIES

- Credits, Debits
- Wires
- ACH Payment History

ACCOUNT MANAGEMENT

- Updating user profile information

INVESTMENTS & FUNDING

- FX, Money Markets, Equities, FI
- Portfolio & risk management

BANK SERVICES

- Money orders • checks • fraud
- disputes • complaints

REPORTING & TRENDS

- Available cash • liquidity & assets

CASH POSITIONS

- Half-day hold
- Balances on multi-currency accounts
- Aggregation

LOOKUPS

- Routing numbers
- SWIFT codes

PAYMENTS & TRANSFERS

- Execution
- Approvals
- Cut-off times
- Processing time
- Fees
- Cancellation

DOMAIN & WORKFLOW Q&A

SUPPORT

- System access issues

This deep financial expertise provides quicker deployments & eliminates the need for costly ramp-up time & training. KAI can track the conversation's goals & intents to do more for your customers. KAI is designed to be intent-based & handle context tracking & switching.

Who's Choosing KAI



J.P.Morgan



Manulife Bank



About Kasisto

Founded in 2013, Kasisto enables financial institutions to service, engage and acquire customers via human-like, intelligent conversations – anytime, anywhere. Kasisto's Conversational AI platform, KAI, powers omni-channel virtual assistants & chatbots who are fluent in banking across mobile apps, websites, messaging platforms, & voice-enabled devices. Contact us to learn more, sales@kasisto.com