Meeting Business Goals Through Exceptional Customer Journeys

SERVICING CUSTOMERS IN WAYS THAT IMPROVE OPERATIONAL EFFICIENCY
Reduce call center volume & empower customers to self-serve.

ENGAGING CUSTOMERS IN WAYS THAT BOOST BRAND LOYALTY
Enable lifestyle banking while championing financial well-being.

ACQUIRING CUSTOMERS IN WAYS THAT INCREASE THEIR LIFETIME VALUE
Help customers discover the products & services they need with proactive conversations that offer timely, contextual suggestions.

Current Customer Results

- **90%** Call Containment Rates
  Freeing up agents to engage in more valued conversations

- **4X** Increase in Automated Chat Responses
  Significantly improving electronic engagement with customers, leading to automated product upsell & cross sell opportunities

- **50%** Reduction in Live Chat Volumes
  Delivering previously unimaginable reductions in call center costs

KAI Shares Context for a Seamless Live Agent Hand-Off
KAI has been designed to hand-off a conversation to a live agent & knows how to keep the customer happy along the way. Once the live chat session is finished, KAI can seamlessly take over the interaction again.

Every Conversation is Human-like & Intelligent
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.

Contact us to learn more, sales@kasisto.com

kasisto.com
Pre-packaged Banking Knowledge Speeds Time to Market

On day one, KAI is fluent in banking. This deep financial expertise provides quicker deployments & eliminates the need for costly ramp-up time & training.

TYPICAL CONVERSATIONAL INTENTS FOR RETAIL BANKING

**Accounts**

**ACCOUNTS**
Check balances on checking, savings & other accounts as well as credit card details such as available credit, minimum payment & credit limit. Request a routing number for an account & answer other simple banking questions.

**ACCOUNT & CARD SERVICING**
Tackle the most common call-drivers about card servicing & help authenticated customers learn more about card offerings, increasing limits, balances & rewards.

**Financial Well-Being & Literacy**

**GLOSSARIES**
Explain banking terms & acronyms to improve financial literacy.

**SMART SPENDING & BALANCE ALERTS**
Notify when spending is over a specific amount for a category or merchant, or a balance is low in a deposit account.

**GOAL-BASED SAVINGS**
Create, track, & receive custom notifications on personal financial goals.

**Payments & Transfers**

**BILL PAY**
Pay bills through the bank account.

**TRANSFER BETWEEN ACCOUNTS**
Make payments & transfers between bank accounts.

**PAY A PERSON**
Pay people in payee list.

**Market & Sell**

**MERCHANT OFFERS**
Receive relevant merchant offers based on eligibility, location, & other variables.

**NEW ACCOUNT APPLICATION**
Apply for different types of accounts & submit as completed for approval or as lead gen for follow up with bank personnel.

**PRODUCT CROSS-SELL**
Deliver timely and relevant offers for the bank’s products & services.

**Bank Information**

**ATM/BRANCH LOCATOR**
Find the closest retail branches & ATMs.

**FAQS**
Get answers to questions about:
• The bank’s business, products & services
• What the virtual assistant or bot can support
• Security and IT

Who’s Choosing KAI

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