

KAI Consumer Banking

The Leading Conversational AI Solution
for the Financial Services Industry

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.

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



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