

Transform FinServ CX with AI

Consumers are flocking to online banking, digital-only fintech companies are flooding the market, and brick-and-mortar branches are fast disappearing. FinServ companies that have embraced AI-powered CX transformation are thriving in the New Normal.

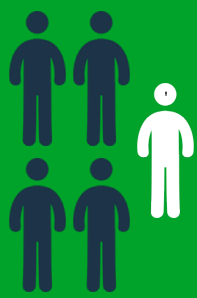
Check out the figures below and then [download the Transforming Your Financial Services CX with AI how-to guide](#).

The New Normal

Your web presence is now key to your brand. Personalization at scale requires dynamic AI.

4 of 5

consumers prefer to manage their finances digitally rather than in person



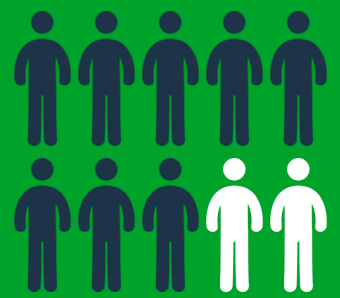
75%

say they'll continue or begin using digital payment options even after the pandemic subsides



8 in 10

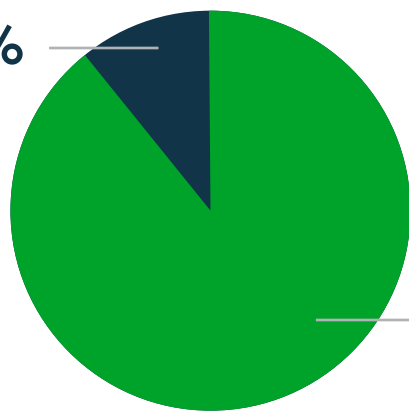
use a smartphone and/or desktop/laptop to complete banking activities



What Poor Automated Banking Looks Like

Have you been asked to repeat information for a human agent that you have already provided to the automated system?

NO 11%

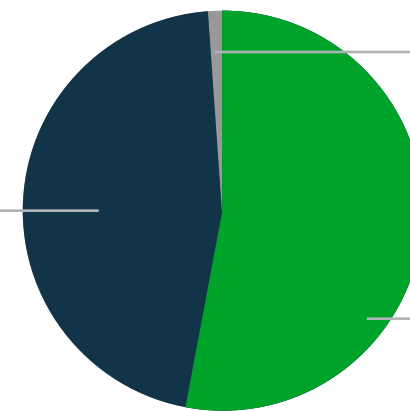


YES 89%

In your experience, do automated (phone, chat, text and email) customer support systems understand the reason you contacted support?

45%

No, they usually can't figure out what I am trying to do



1%

I don't use automated systems

54%

Yes, they usually understand what I am trying to do

How AI Improves Digital Interactions



Automates most tasks



Enables self service



Maintains context across channels



Predicts intent and proactively offers support

Best Banking Experiences: In-Person vs. Digital

The best banking experiences share the same qualities.

In-Person



Convenient



Easy



Personalized

Digital



Convenient



Easy



Personalized

5 Keys to Transform FinServ CX

AI enables CX transformation every step of the way.

1

Increase web and digital presence

2

Automate journeys and boost self-service

3

Make life easier for agents, too

4

Use interactive visuals cards

5

Automatically adapt content across channels