



AI Role-Play Coach

AI Roleplay Hyper-Real Customers | Simulate Real-life Scenarios

Hone Skills with AI, Shine with Real Clients



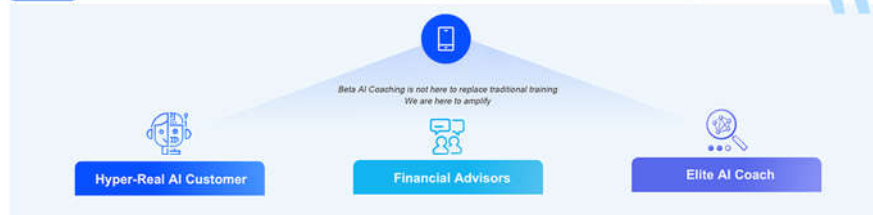
Challenges Facing FA/RM Teams

The Triple Burn Crisis

Slow Rookie Ramp-Up / New Products / Distracted Clients

Client / Budget / Team

01 The BETA Success Formula for Financial Advisors



02 How BETA Creates Ultra-Real AI Customers



03 How BETA Builds The AI Elite Coach



04 Core Features




- AI Customer Call
- AI Live Coaching



- 5D Evaluation
- Curated 1-on-1 Learning Plan

05 Simulated Real Life Conversations: Over 1,000 Scenarios

2 million+ Product Data

Product
Insurance
• Increased Whole Life Insurance Marketing
• Helped Entry for Insurance Sales
• Dividend Insurance Marketing
• ...
Funds
• Fund Loss Unwinding
• Bond Fund Marketing
• Equity Fund Marketing
• ...
Wealth Management
• Closed-End Wealth Management Marketing
• Fixed Income Wealth Management
• Mid-to-Long Term Wealth Management
• ...
Others
• Account Gold Marketing
• Physical Gold Marketing
• Credit Card Application
• ...

10+ Key Scenarios

Competency
Objection Handling
• Wealth Management Common Objection Training
• Fund Common Objection Training
• Wealth Insurance Common Objections
• ...
Cross-Selling
• Transforming Customers with High Demand Deposit
• Rate to Wealth Management
• Explaining Asset Allocation Concepts
• ...
Face-to-Face Conversion
• Telephone Invitation for Face-to-Face Meeting
• Family Trust Face-to-Face Communication
• Wealth Management Face-to-Face Marketing
• ...
Comprehensive Competence
• Customer KYC
• Attracting External Funds from Customers
• Claiming New Customers and Adding WeChat
• ...

100+ Typical Customers

Customer Segment
Retirement
• Term Deposit Maturity Conversion
• First-time Marketing of Wealth Management
• Inviting Elderly Customers for an Appointment
• ...
High-Net-Worth
• Large Transaction Marketing
• Wealth Management Maturity Marketing
• Large Insurance Policy Marketing
• ...
Salary Disbursement
• Year-End Bonus Marketing
• Phone Invitations for Payroll Customers
• Deposit Maturity Marketing
• ...
Others
• Long-Tail Customer Segment Maintenance
• Family Customer Segment Asset Allocation
• WeChat Customer Cultivation
• ...

Full-scale Marketing Scenario Practice | Resolving Sales Communication Challenges | More Scenarios Supported for Customized Institution Needs

06 Core capabilities: Product database&Investor education content library



The Trusted Partner of

130K+

Bank Branches Penetration

1000+

Institutional Clients

1.7+ Million

Relation Managers

Backed by





AI COACH

Skill Your Team. Seal Your Deal.



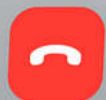
Coach × **deepseek**

Why such a big loss? ·~)

Can you guarantee? ·~)

Can it rise back again? ·~)

Listening



AI Customers, Real Combat.

Sharpen Your Skills Before You Step Into “ the Real Fight ”

★  Deepseek Bootcamp



Private Coaching
Real-Time Corrections
Full-Time Sparring

VS

Conventional Training



Videos Don't Coach.
They Just Play.

From Scripts to Muscle Memory