

Hyper Communications Automation for FinServ

<Presenter Name>

<insert date>



IntelPeer at a glance

IntelPeer simplifies communication automation for FinServ institutions and contact centers. Our platform lowers the cost of doing business while improving customer experience and accelerating ROI.

2,500+ customers

Large Enterprise FinServ Customers Include:



Customer Story Highlight



TRANSFORMING FINSERV EFFICIENCY

IntelePeer’s hyper-automation and AI results in a **24% surge in self-service payments**, generating **\$2.3 million in extra fees**, and **slashing agent calls by 22%**. Meet customer expectations with a seamless digital experience, while maximizing customer satisfaction and loyalty.

The state of automation

FinServ trends

Banks can save up to \$15 billion by 2025 by automating customer interactions. (Juniper Research)

Up to 80% of financial interactions can be automated by 2025. This is a significant increase from the current rate of 50%. (Gartner)

Sixty-four percent of CFOs believe autonomous finance will become a reality within the next six years. (Gartner)



FinServ Business Challenges



Outdated
technology



Security
Breaches



No Appointment
Management/
Costly Rescheduling



Manual Customer
Alert Delivery

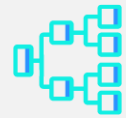


Staffing Shortages



Customer
Satisfaction

Why Finserv Businesses Choose IntelePeer



Operational Efficiency



Cost Reduction



Enhanced Decision-Making



Optimize Staff Productivity



Security & Compliance Management



Competitive Advantage

IntelePeer is transforming FinServ communications with automation and AI



Call Center Agents

Reducing labor cost by improving percentage containment up to 90% for all inbound and outbound customer interactions, leveraging LLM and generative AI

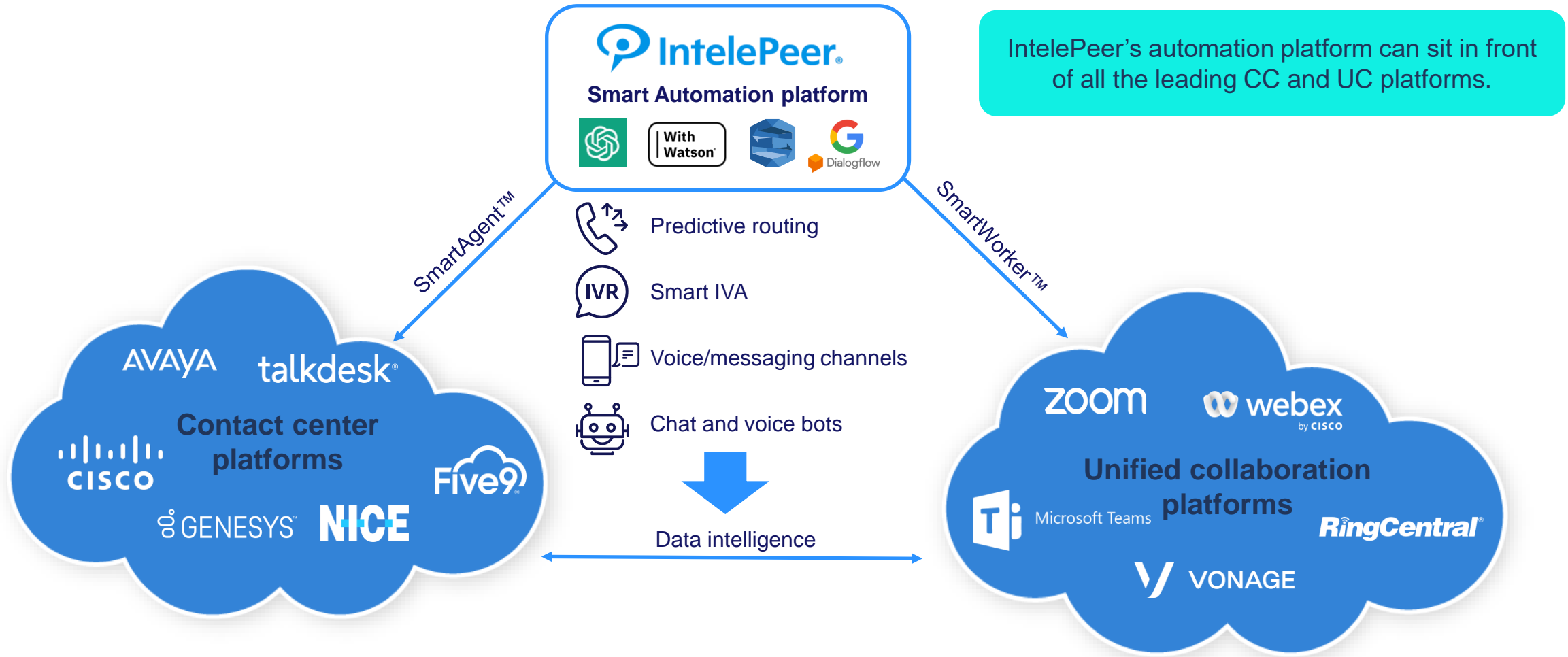


Enterprise Workers

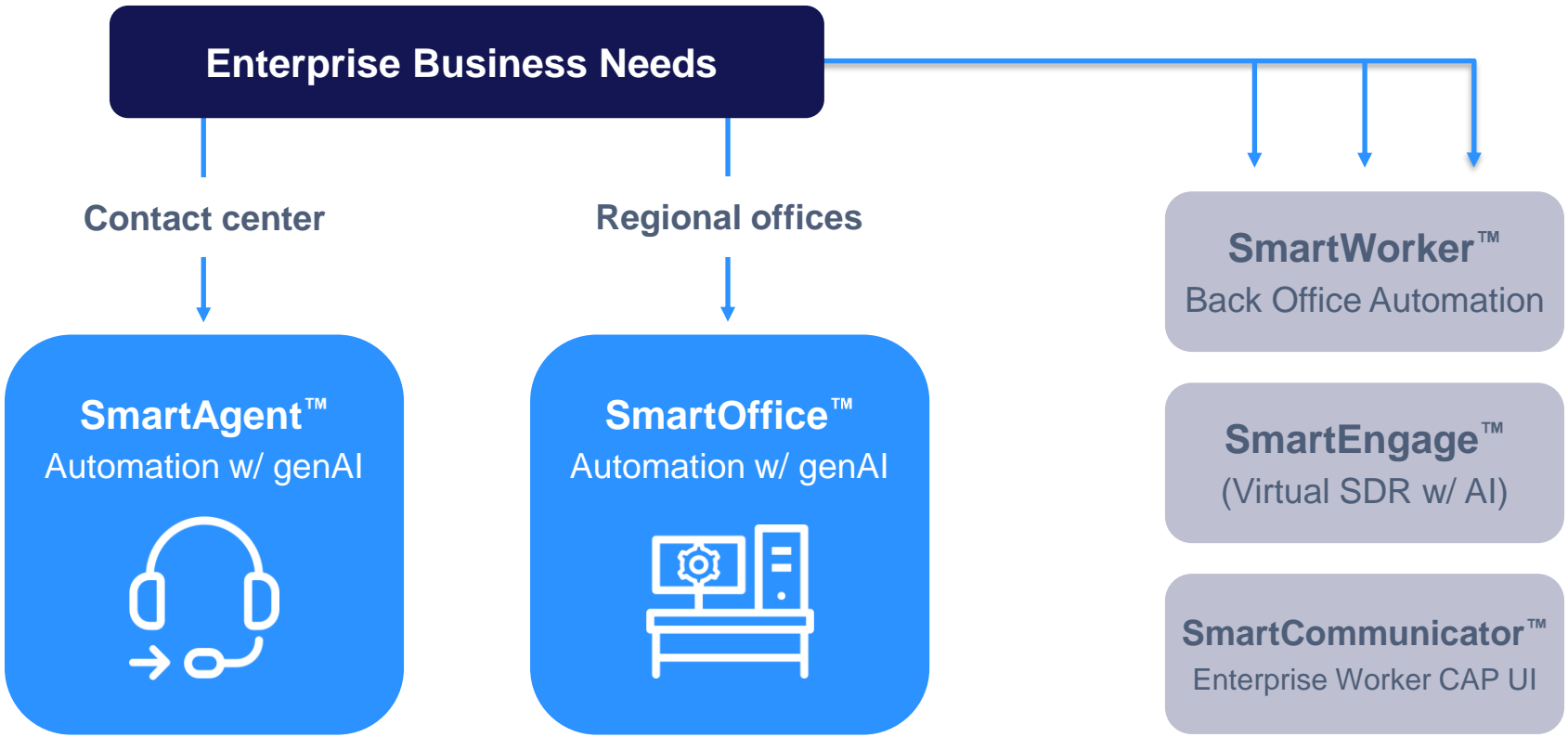
Improving productivity of enterprise workers through communications automation, leveraging data integrations and AI

IntelePeer Smart Automation

AI for communication automation

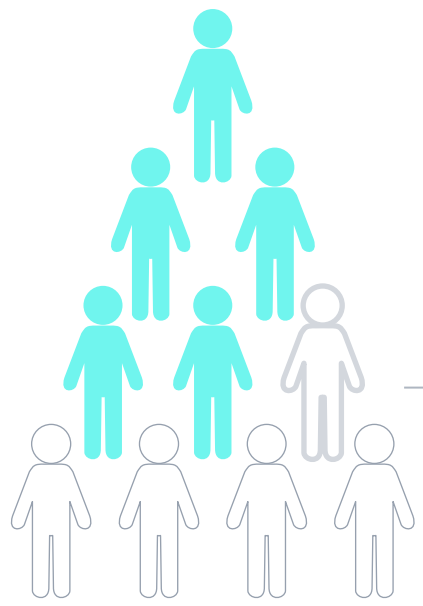


Smart products



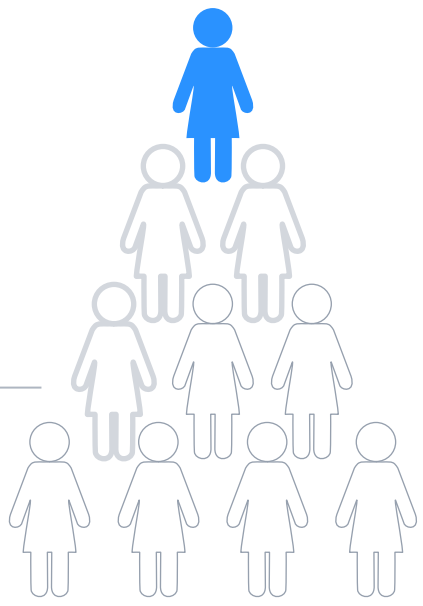
Live Agent vs IntelePeer Smart Agent

Live Agent



Annual Agent Cost: \$40,000
40 hours per week

IntelePeer Smart Agent



Annual Cost per Agent: \$9,000
24/7 availability

VS

- ✓ Improved customer experience
- ✓ Faster resolution times
- ✓ Personalized Self Service
- ✓ Increased customer loyalty
- ✓ 24x7 Intelligent call handling
- ✓ Enhance contact center efficiency
- ✓ Pays for itself in less than 90 days

Benefits of FinServ automation with generative AI



Transforming contact center productivity

- ✓ Automate routine tasks
- ✓ Handle basic inquiries and support requests
- ✓ Free up agents to focus on higher priorities
- ✓ Wash-rinse-repeat to drive to higher automation and containment



Reshaping the customer experience

- ✓ Personalized and conversational responses
- ✓ Intelligent call routing
- ✓ Leading to faster resolution time



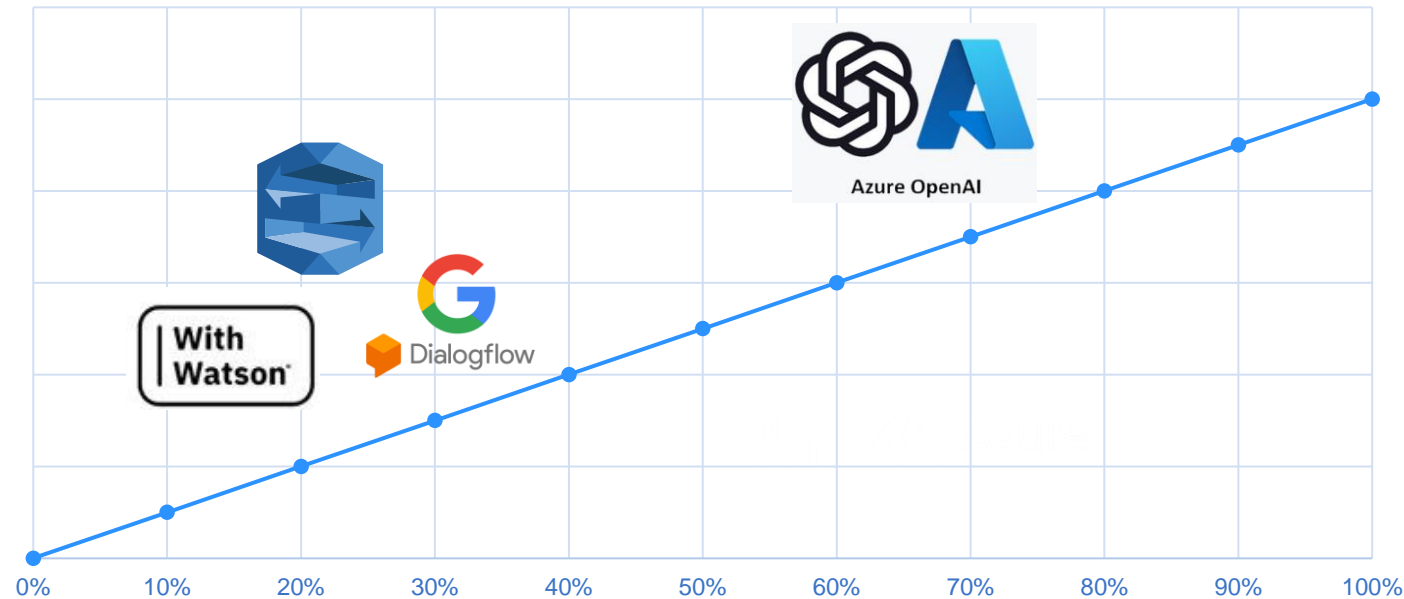
Leveraging data to improve operations

- ✓ Gain valuable insights into customer behavior and preferences
- ✓ Analyze interactions to identify patterns and trends

Automate the FinServ customer lifecycle journey using power of generative AI

Self-funding ROI within 3 months

Self-Service Rates



IntelePeer Smart family of products

Benefits:

- Improved CX
- **90%+ self-service rate**
- Best-of-breed AI approach
- **Faster time-to-market**
- Generative models are 5x faster to implement

Enterprise-grade

- Privacy / compliance
- Security
- Enhanced guardrails

CASE STUDY:

Hyper-automation for a Fortune 100 Health Insurer

- Intent capture
- ID and authentication
- Card activation
- CRM screen pop
- FAQs
- Transaction history
- Account notifications
- Program benefits

The Customer

100M benefits cards in circulation. Largest Medicare/Medicaid benefits provider in U.S.

The Environment

- Call volume growth 200%+ annually tied to membership growth
- 7,000+ agents across 5 different BPOs
- 5 different contact center environments



We see the IntellePeer platform as a differentiator for what we can provide to our customers. It has helped us shift from cost-savings to revenue-generating activities.

The IntellePeer Solution

IntellePeer automation platform for self-service, advanced routing, and back-office integration

Result

- **60% self-service rate:** Automated 40M+ calls in '22
- **Moving to hyper-automation:** Achieving 75%+ call containment with generative AI
- **Scalability and reliability:** Peak volumes of 5,000 concurrent calls
- **No system replacement:** Innovative automation add-on to existing contact center solutions in place
- **Reduced on-prem to CCAAS migration effort by 75%**
- **Revenue generation:** Agents able to focus on up-selling rather than simple tasks such as card activation

CASE STUDY: Financial services firm

40% automation rate in 90 days for card services and banking application

The Customer

FinTech that provides a debit card for kids, enabling parents to monitor and control their children's spending, as well as a savings account with a high interest rate.

The Challenge

- Increase self-service rate to reduce call volume that is transferred to an agent
- Provide better customer experience by not needing to talk with a live agent and reduce agent costs
- Model automation to replicate process agent

Contact Center Environment

Nice CXOne

The IntelPeer Solution

Conversation IVA that sits in front of Nice CXOne to self-service calls and only hands off calls requiring live agent assistant to Nice CXOne.

Outcome and What's Next

- Combined automation-and-voice solution provided simplified call flow and enabled faster time-to-value
- 40% out the gate self-service for voice channel
- Building out chat experience in Q4 and expanding voice automation rate with generative AI based on intent data



Demo <adjusted for whatever demo using>

Generative AI in Action

Sample Use Case:



Ask about using Benefits...



Ask can I buy a specific Product...



Ask it something that is off the wall...

Art of the Possible <adjusted for prospect>

What are the automation opportunities for Account Statements?

- What are common interaction types?
- CRM disposition data?
- What are ways to communicate account statements without a live agent?

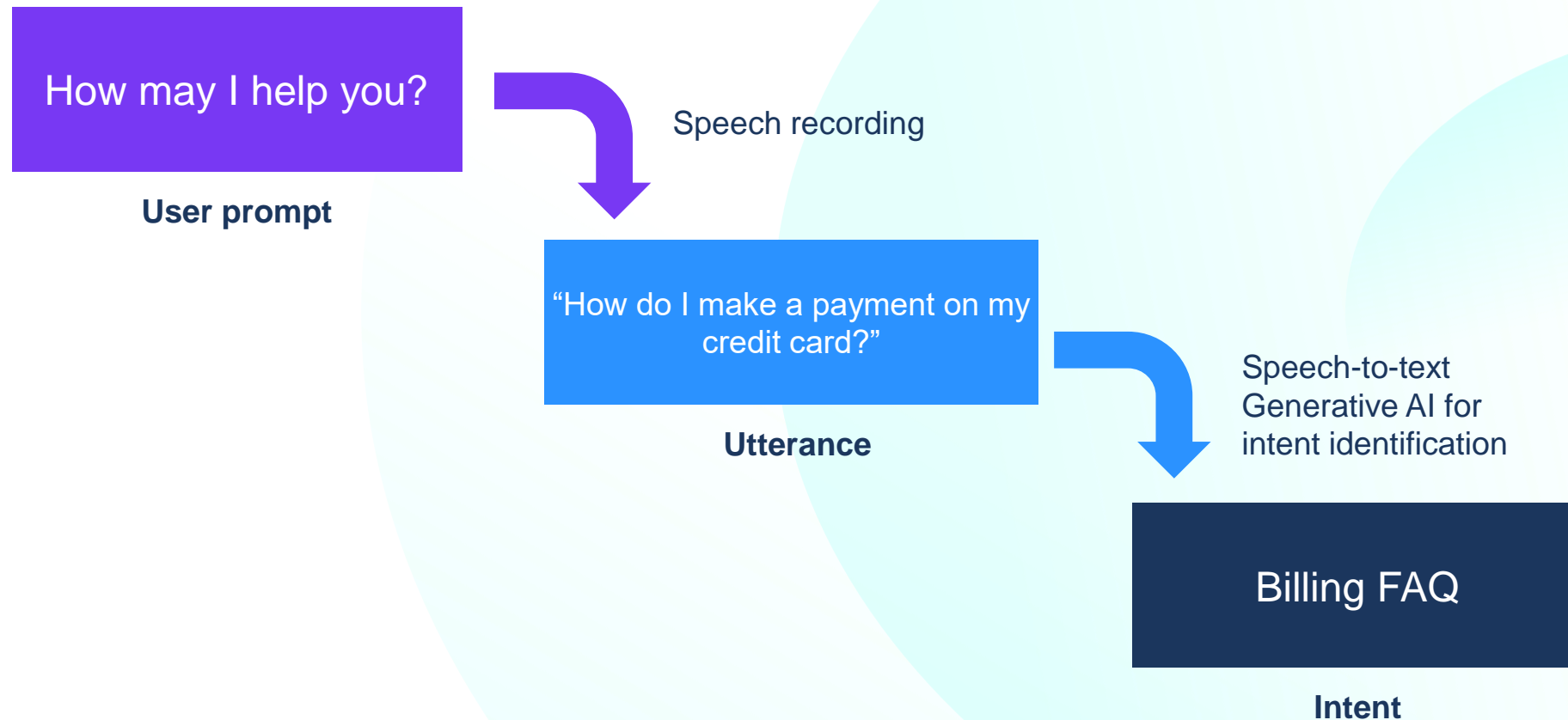
Sample Use Case Concepts

- Account Notifications
- Transaction Alerts
- Fraud Alerts
- Account Statements
- Loan Application Status Updates
- Financial Advice and Tips
- Appointment Reminders for Financial Consultants
- Regulatory Compliance Updates

FinServ IntelePeers



Intent Study: Determining What to Automate (FinServ)



Intent Study Mapping (Sample Categories)

Sample Customer Intents

Can you explain how to make a transfer between accounts?
What is the process for setting up automatic bill payments?
Are there fees associated with certain transactions, and how can I avoid them?
How can I apply for a personal loan or credit card?
What are the current interest rates on loans?
Can you provide information about mortgage options offered?
Is there a way to dispute a transaction or report fraudulent activity?
Where is the nearest ATM or branch to my location?
What services are available at your branches?
Can I set up account alerts for suspicious activity?
What savings and investment products does you offer?
Are there investment advisory services available through your bank?



Sample Intent Category	%	Potential Use case
Check account balance/money transfer	30%	Account lookup
Make a payment	25%	Billing FAQ
Inquire about a service	20%	Product FAQ
Report lost/stolen card	15%	Card activation
Customer Service Support	10%	Speak to an agent

Leverage Intent Study to capture customer intents and categorize into intent categories and opportunities for self service

Why IntelePeer for automation?



Significant labor cost reduction

Automation allows businesses to re-think their need for costly contact center agents.



In-quarter ROI

Experience immediate payback as automation project pay back their investment within quarter.



Increased Revenue Growth

AI-powered automation enables hyper-personalized, scalable and efficient customer interactions leading to higher revenue growth.



Improved CSAT / customer experience

Automation provides a better customer experience without the need for agent intervention.

Paths to Getting Started

1. Healthcare Patient Intent Study
2. Automation Discovery Workshop
3. Targeted Demo for Art of Possible

Hyper-Automation State



Human Like Experience



90% Voice Self Service



Reduction in Agent Spend



Contextually connected customer journeys and drive digital adoption