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Agent Advantage™ for Salesforce

The *Banking Service Agent* accelerates dispute resolutions and enhances customer experience.

BUSINESS CHALLENGE

Traditionally, the dispute management process demands considerable manual effort from banking advisors, who meticulously review case details of disputed transactions. Advisors invest significant time in examining each relevant field and verifying compliance with business rules defined for dispute management to provide a resolution.

AGENTIC SOLUTION

The Banking Service Agent enhances the dispute management process by providing banking advisors with suggested resolutions, thereby accelerating the process and delivering a seamless, user-friendly interaction experience.

VALUE PROPOSITION

Business Growth
Enhanced growth as Emily can spend more time with clients and improve client experience.

Improved Advisor Experience
Advisors can focus on building relationships instead of spending time on repetitive tasks.

Quick Resolution
Client can Dispute a transaction efficiently without needing to visit a branch or make lengthy phone calls.

Customer Trust
Build and maintain strong relationships with customers by delivering reliable and effective solutions.

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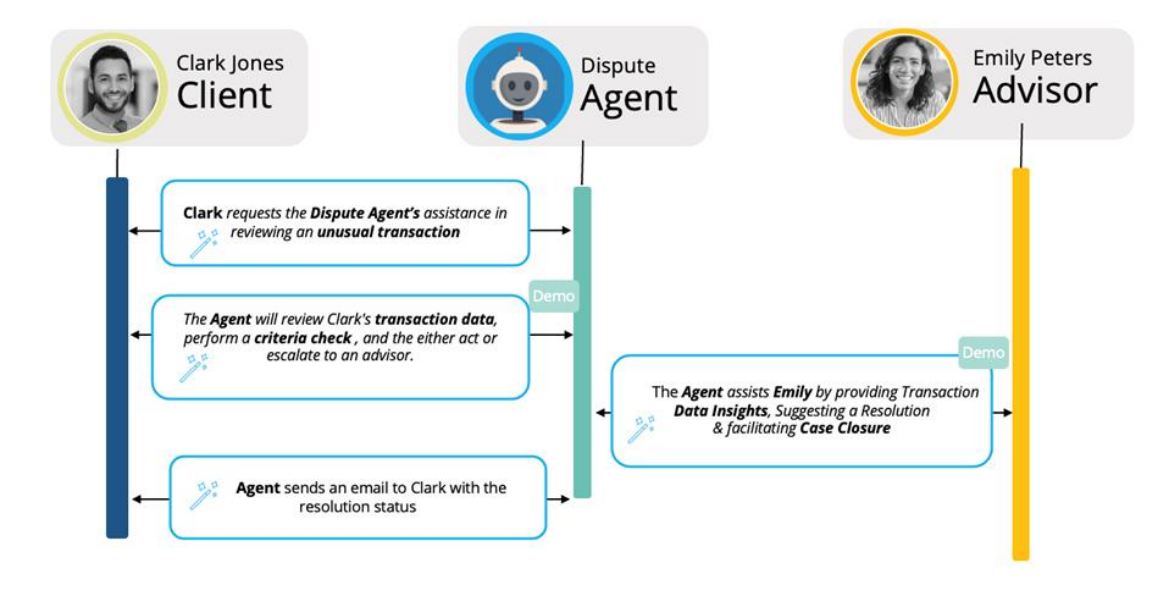
AGENT CAPABILITIES

Efficient Issue Resolution
Quickly resolve common customer queries and issues through automated responses.

Enhanced Accuracy
Improve the accuracy of dispute resolutions by leveraging data-driven insights and recommendations.

Tailored Experience
Provide personalized and tailored customer experiences to meet individual needs and expectations.

Support Advisors
Assist banking advisors in making informed decisions, reducing the time and effort required to resolve disputes.



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Agent Advantage™ for Salesforce

The *Banking Sales Agent* generates tailored credit card recommendations using customer insights.

BUSINESS CHALLENGE

Recommending credit cards to customers for specific purposes, such as travel, involves significant manual effort and is a time-consuming process. Advisors often engage in lengthy discussions with customers to understand their needs and preferences before offering tailored recommendations. Additionally, the absence of data-driven insights can lead to inaccuracies in the recommendations, resulting in lower customer satisfaction and engagement.

AGENTIC SOLUTION

The Banking Sales Agent streamlines the credit card recommendation process by leveraging automation and enhanced data utilization. This approach enables quicker, more accurate recommendations tailored to individual customer needs, ultimately driving business growth.

VALUE PROPOSITION

Business Growth
Enhanced growth as Emily can spend more time with clients and improve client experience.

Increased Conversion Rates
Providing targeted products that are more likely to be accepted by the customers.

Improved Advisor Experience
Advisors can focus on building relationships instead of spending time on-repetitive tasks.

Enhanced Customer Loyalty
Foster stronger customer loyalty by consistently offering products that meet their evolving needs, encouraging long-term relationships and repeat business.

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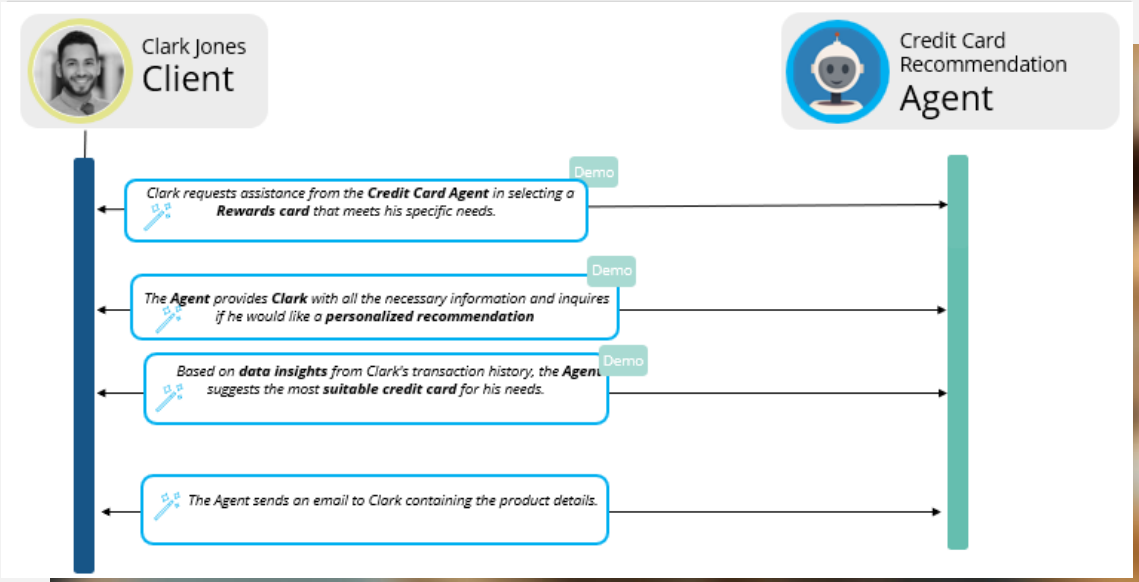
AGENT CAPABILITIES

Efficient Issue Resolution
Quickly resolve common customer queries and issues through automated responses.

Enhanced Accuracy
Improve the accuracy of recommendations by leveraging data-driven insights and personalized suggestions.

Tailored Experience
Provide personalized customer experiences to meet individual needs and expectations.

Support Advisors
Assist banking advisors in making informed decisions, reducing the time and effort required to understand customer needs.



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Agent Advantage™ for Salesforce

The *Banking Loan Agent* assists banking advisors by automating the loan prequalification process for customers.

BUSINESS CHALLENGE

Traditionally, the process of prequalifying a customer for a loan requires substantial manual effort from a Banking Advisor. Advisors spend significant time on tasks such as data collection, initial eligibility checks, and application submissions. This manual handling often leads to delays, inconsistencies, and a less-than-optimal customer experience. Crafting personalized responses and managing follow-ups can also be challenging.

AGENTIC SOLUTION

The Banking Loan Agent is designed to assist a banking advisor in efficiently prequalifying customers for loans by automating routine tasks, managing customer interactions, and helping ensure that the advisor's goals are met through strategic process and necessary support.

VALUE PROPOSITION

Business growth:
Enhanced growth as the Banking Advisor can spend more time with potential clients and close more deals. Improved Advisor experience, allowing them to focus on building relationships instead of spending time on repetitive tasks.

Efficiency gains:
Agent collecting data and conducting eligibility checks reduces the time to proposal, and deals are closed faster. Enhanced customer experience for potential clients, who have less dependency on advisor availability and can work on their own schedule.

Consistent support:
Customers receive consistent and accurate information, building trust in the bank's responsiveness and reliability.

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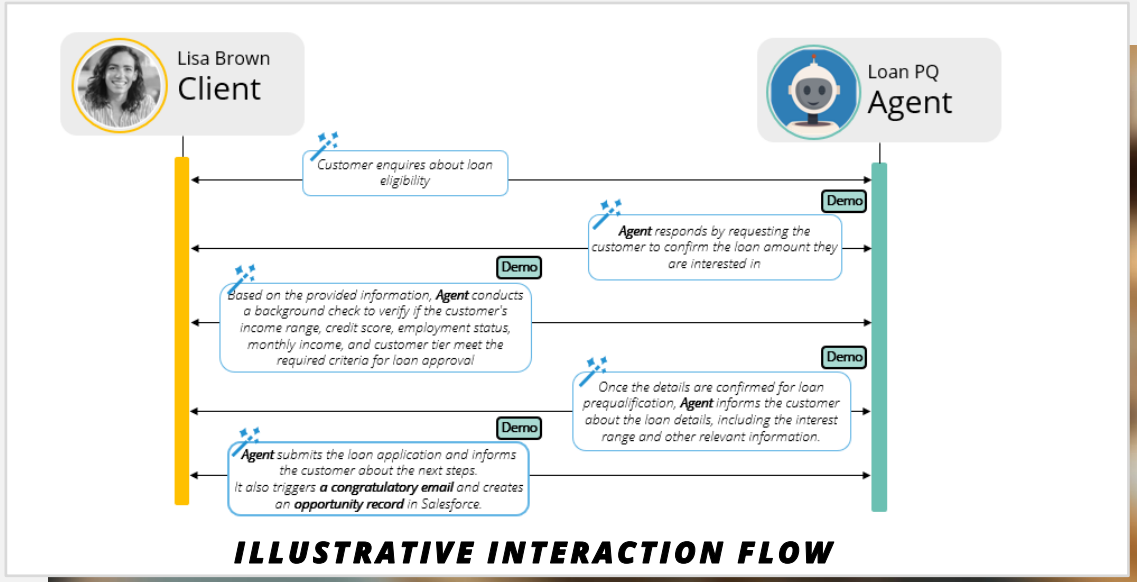
AGENT CAPABILITIES

Initial inquiry handling:
Respond to customer inquiries and request confirmation on loan amounts.

Background verification:
Verify income range, credit score, employment status, monthly income, and customer tier against approval criteria.

Loan prequalification:
Inform customers about loan details, including interest range and other relevant information.

Application submission:
Agent understands the importance of individual customers in the business and share personalized compensatory offers as per the customer sentiment.



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Agent Advantage™ for Salesforce

The *Broker Assistant Agent* offers personalized policy coverage recommendations and streamlined quote comparisons.

BUSINESS CHALLENGE

Commercial insurance brokers often face challenges in gathering client information, ensuring accurate coverages to meet client needs. The process must be efficient, customer-friendly, and compliant, while minimizing delays to provide the best insurance options to the client.

AGENTIC SOLUTION

The Broker Assistant Agent provides personalized coverage recommendations, basic rationale and guidance coverage line items like limits, sub-limits, deductibles, and specifications. This solution can help save time, improve client interactions, and helps ensure an efficient, customer-focused, and compliant process, enabling brokers to offer effective insurance solutions.

VALUE PROPOSITION

Performance boost:

Reduced effort on researching for required coverages, line items and specifications boosts overall performance of brokers.

Streamlined processes – minimizing errors:

Helps ensure that the process is customer-focused, reducing the risk of errors and oversight

Time-saving for brokers:

Streamlines coordination and follow-ups, which can lead to higher referral success rates and fostering stronger client relationships. Automates repetitive tasks, freeing up valuable time for more strategic activities.

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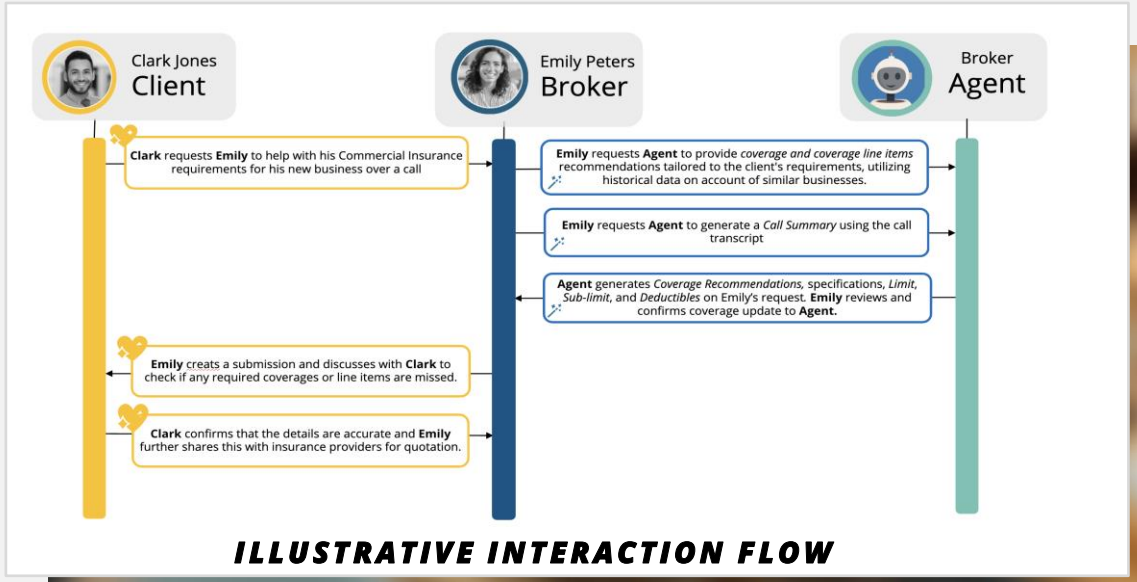
AGENT CAPABILITIES

Personalized coverage recommendations:
Provides tailored coverage suggestions based on client requirements.

Tailored recommendations:
Advises on specifications like policy terms, conditions and limitations to meet client needs.

Guidance on limits, sub-limits, and deductibles:
Offers advice on appropriate limits, sub limits, and deductibles.



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Agent Advantage™ for Salesforce

The *Broker Quoting Agent* automates quote collection and analysis and provides optimal insurance options to clients.

BUSINESS CHALLENGE

Traditionally, commercial insurance brokers often face challenges in the quote comparison process. Gathering accurate client information, ensuring appropriate coverage, and obtaining quotes from multiple carriers can be time-consuming and complex. Brokers need to efficiently compare these quotes to provide the best options to their clients, all while maintaining a customer-friendly and compliant process.

AGENTIC SOLUTION

The Broker Quoting Agent is specifically designed to enhance the quote comparison process. This solution automates the collection and analysis of quotes, providing brokers with detailed, ranked summaries. The Broker Agent offers personalized quote recommendations and guidance, helping ensuring that brokers can quickly and accurately present the best insurance options to their clients.

VALUE PROPOSITION

Enhanced efficiency:
Streamlines the quote comparison process, saving brokers time and reducing manual effort.

Better client outcomes:
Personalizes recommendations and guidance help brokers present the best options to their clients.

Increased client satisfaction:
Efficient and accurate quote comparisons lead to higher client satisfaction and trust.

Compliance:
Confirms that the quote comparison process is compliant with industry standards, reducing the risk of errors and omissions.

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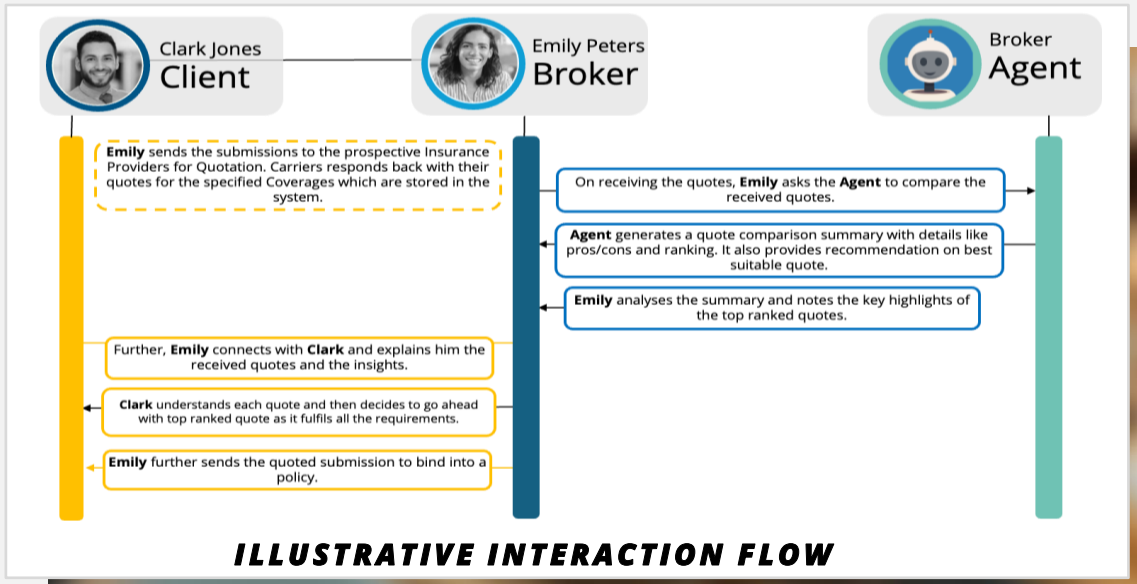
AGENT CAPABILITIES

Automated quote comparison:
Streamlines the process by generating detailed summaries , allowing brokers to efficiently understand and communicate insurance options.

Detailed quote analysis:
Analyzes and compares quotes, highlighting key differences in coverage, limits, sub-limits, and deductibles.

Ranked summaries:
Provides organized list of quotes , making it easier for the brokers to identify best options quickly.

Personalized recommendations:
Provides tailored coverage suggestions based on the specific needs and preferences of the client.



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Agent Advantage™ for Salesforce

The *Insurance Sales Agent* supports customers by providing personalized recommended property insurance options.

BUSINESS CHALLENGE

When a current client has one type of insurance policy but does have other complementary policies, the insured has an opportunity to cross-sell and bundle the additional policy with the client's existing coverage, offering enhanced protection and potential savings. However, this process must be seamless, persuasive, and efficient, while handling the complexities of policy customization and human agent participation.

AGENTIC SOLUTION

The Insurance Sales Agent identifies upsell & cross-selling opportunities and presents customized home insurance options tailored to client's property size, and documents conversations under each opportunity.

VALUE PROPOSITION

Improved customer experience:
Guided process makes it easier for customers to explore additional insurance options. Clear explanations of bundling benefits and seamless transitions to human agents create a hassle-free experience.

Tailored Coverage Solutions
Personalized recommendations based on individual client profiles enhance decision-making, ensuring that customers receive the most relevant and cost-effective insurance solutions tailored to their unique needs.

İncreased operational efficiency:
Cross-selling opportunities: identifying gaps in a customer's existing coverage allows the company to maximize revenue by offering relevant products. A proactive approach with digital agent ensures customers are aware of valuable options, increasing policy uptake.

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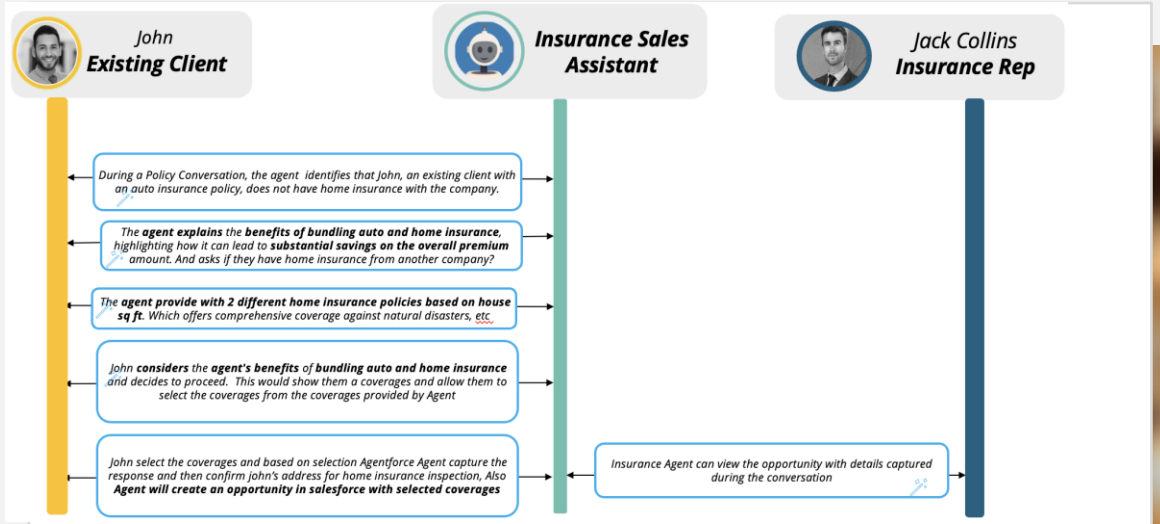
AGENT CAPABILITIES

Customer policy review & identification:
The agent reviews client's auto policy and identifies the absence of home insurance.

Customization of Insurance options:
The agent tailors home insurance options based on the client's specific needs & characteristics , ensuring personalized coverage.

Offer presentation:
The agent explains the benefits of bundling home and auto insurance, emphasizing premium savings.



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Agent Advantage™ for Salesforce

The *Policy Service Agent* helps P&C insurance customers add or remove drivers and vehicles on their policy.

BUSINESS CHALLENGE

Adding a vehicle to an existing policy for P&C insurance has traditionally relied heavily on phone calls or online interactions. Policy holders often connect with a live agent over the phone to update their policy details. This conventional approach presents challenges such as long wait times, potential errors in data entry, and inefficiencies in communication, leading to delays and frustration for policyholders seeking timely updates to their coverage.

AGENTIC SOLUTION

The Policy Service Agent revolutionizes policy holder service by streamlining the process for making policy updates (i.e., adding a vehicle or driver) through an intelligent, customer-centric chat interface. This solution empowers P&C insurance companies to deliver personalized and efficient service, ensuring they can retain more of their policyholders.

VALUE PROPOSITION

Tailored insurance experience:
Provides a personalized experience to policyholders to help them add a driver or vehicle to their policy and receive an updated quote.

Enhanced customer engagement:
Improves customer engagement, fostering a stronger brand relationship to ensure customer retention and improved customer lifetime value.

Efficient policy updates:
Streamlines the quoting and policy update processes, saving time for both customers and insurance companies and reducing administrative burdens.

Data-driven insights:
Data can also be used to provide valuable insights for insurance companies to optimize their operations and improve service outcomes.

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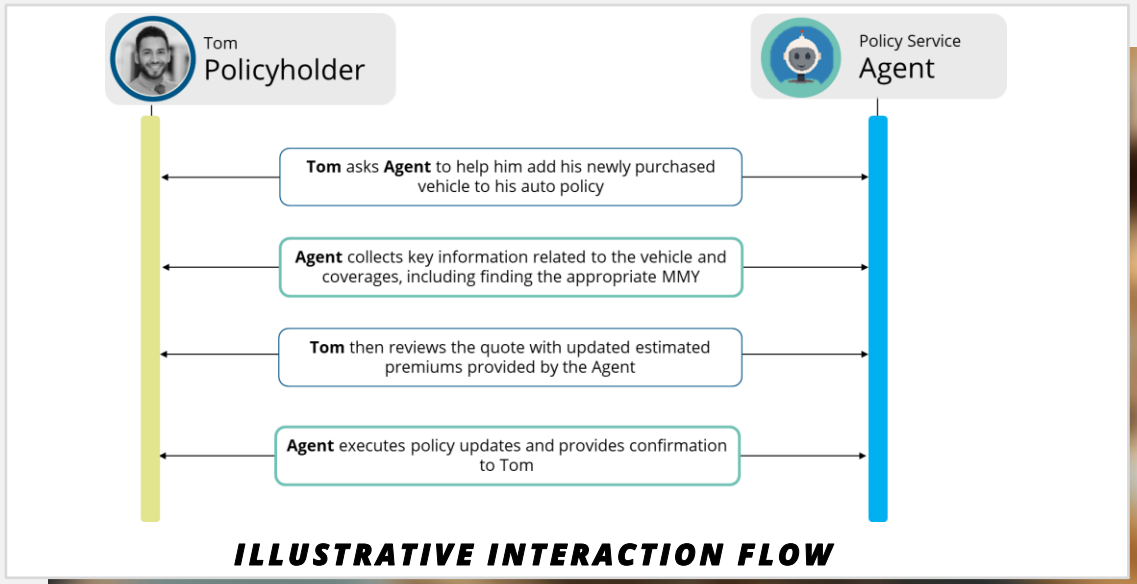
AGENT CAPABILITIES

Vehicle search:
Agent finds appropriate make, model, and year based on VIN or user input.

Quoting:
Agent provides a quote for the updated policy with the new vehicle or driver added.

Information collection:
Agent collects information related to the policy updates the user would like to make.

Policy update:
Agent executes the policy updates and provides confirmation to the user.



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Agent Advantage™ for Salesforce

The *Wealth Advisor Agent* empowers advisors with customer analysis, enhancing efficiency and client interaction.

BUSINESS CHALLENGE

Historically, wealth advisors struggle with time-consuming administrative tasks such as updating CRM systems and preparing for client interactions, which limits their ability to engage with clients and drive business growth. The lack of automation and real-time insights further hamper their ability to provide personalized and timely advice.

AGENTIC SOLUTION

The Wealth Advisor Agent collaborates with the wealth advisor, assisting them in becoming a Next Generation Advisor. This experience envisions a future where advisors are empowered by AI-driven efficiency, providing more client interaction time and reducing administrative tasks.

VALUE PROPOSITION

Reduced manual work:

Automates repetitive tasks, freeing up valuable time for more strategic activities.

Customer interaction optimization:

Automating initial outreach and follow-ups helps ensure timely and personalized communication with potential customers, boosting engagement and conversion rates. This approach ensures prompt responses, well-organized meetings, and tailored interactions, significantly enhancing the overall customer experience. Consequently, it fosters repeat business and drives long-term success."

Trend identification

Uncovers transaction trends, enabling proactive strategy adjustments and enhanced client advisory services.

Consistent customer support

Handle queries related to products, pricing and tax to help ensure customers receive consistent and accurate information, regardless of an advisor's availability.

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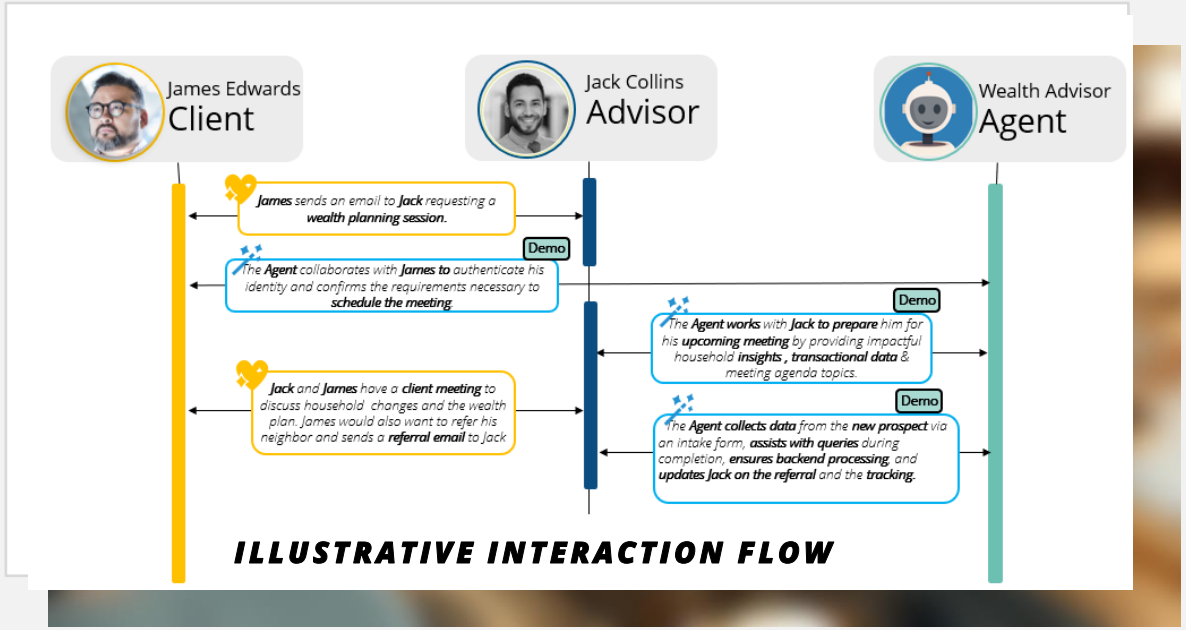
AGENT CAPABILITIES

Client briefing:
Prior to the scheduled meeting, provides a comprehensive summary of the client's household details for the advisor.

Efficient meeting scheduling & support services:
Schedules meetings in preferred time slots, ensuring no calendar conflicts. Provides comprehensive support for queries including off hours assistance.

Manage referrals:
Simplifies the referral process by collecting key details , tracking progress and evaluating conversion rates to enhance effectiveness.

Transaction analysis:
Assists in understanding client's ACH transactions by analyzing and presenting detailed transaction histories.



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