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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.

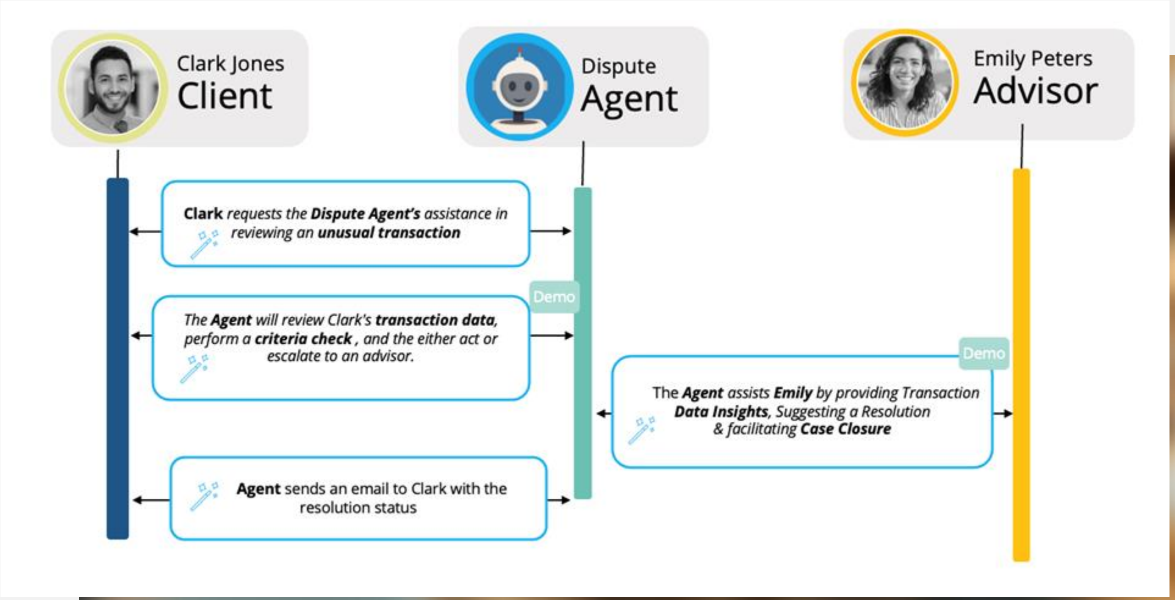
AGENT CAPABILITIES

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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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.

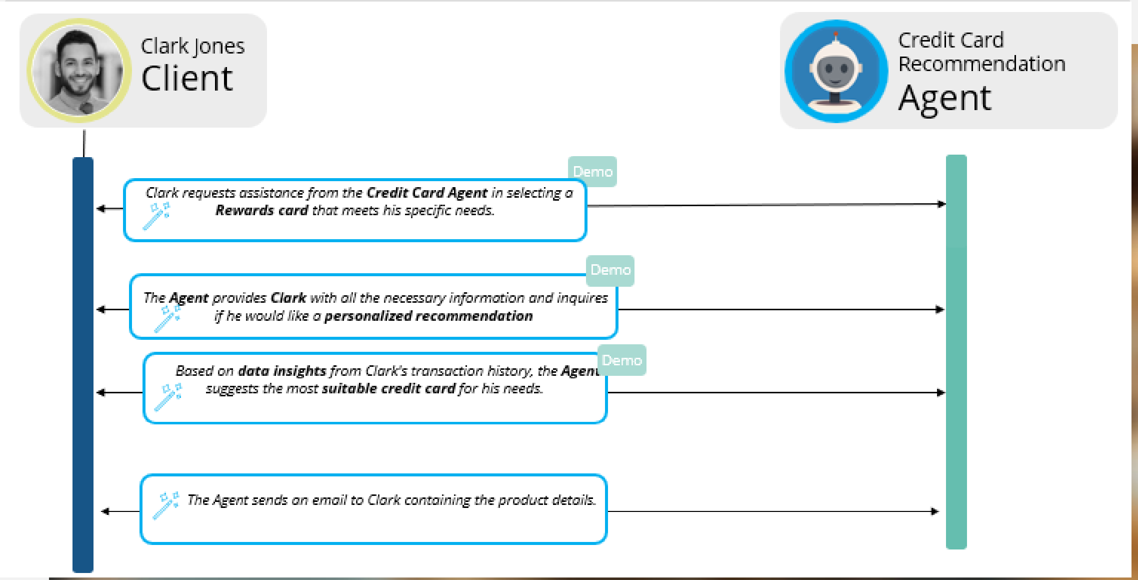
AGENT CAPABILITIES

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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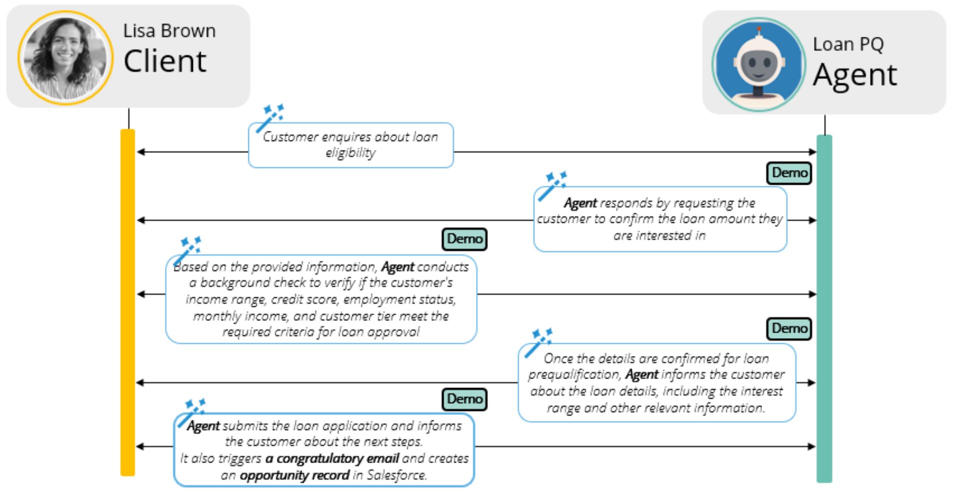
AGENT CAPABILITIES

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.



ILLUSTRATIVE INTERACTION FLOW

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