

# **Elevating Financial Services: Unleashing the Power of Customer Experience and AI**

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Sprinklr – June 2023

**Hey, I'm Cory Declusin 🖱️**  
**Director, CX(M) Best Practices**



# Hypergiant helps big brands look beyond the AI buzzwords

Anthony Ha @anthonyha / 4:37 PM GMT+1 • February 20, 2018

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## Why we have to get smart about artificial intelligence

### Artificial Intelligence

### The Buzzword

Philippe Branche Former Contributor  
Covering China with a focus on finance.

Banking

## HOW AI IS DISRUPTING THE BANKING INDUSTRY

July 4, 2018

Guest

## Why is now the time for artificial intelligence?

Steven Kuyan, NYU Future Labs  
John Frankel, ff Venture Capital

August 12, 2016 2:10 PM

f t in

## Getting Ready for AI – The Next Digital Frontier

Vivek Jaiswal - January 30, 2019

## AI Technology Revolution Is Just Getting

### AI will Started displa

By Tiernan Ray May 26, 2018

17 July 2018 · Comments

### Why AI's massive disruptions may be just what you're looking

### Why 2015 Was a Breakthrough Year in Artificial Intelligence

Computers are "starting to open their eyes," said a senior fellow at Google. ence is becoming a serious part of our lives. achines that know you -- really, really know

By Jack Clark  
8 December 2015 at 14:00 CET Updated on 10 December 2015 at 20:45 CET

### Put your finance team on the road to AI and automation (1/2)

7 min read

By Tim Wakeford February 20, 2018

Dyslexia mode

## 5 Cases Of Artificial Intelligence For Customer Experience

Blake Morgan Senior Contributor  
I am a Customer Experience Futurist, Author and Keynote Speaker.

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Aug 1, 2018, 02:28pm EDT

## Artificial Intelligence Beyond The Buzzword From Two Fintech CEOs

## Finance jobs requiring A.I. skills increased 60% last year—here's what they look like

Published Wed, Sep 25 2019-11:05 AM EDT



# Showing and Communicating Strength: Double Down on Trust

## Clear vetted and approved messaging to strengthen confidence

1. Communicate strength, longevity and stability on all necessary channels
2. Create effective content with real-time internal and external collaboration
3. Reduce risk with compliant framework, governance





# Showing and Communicating Strength: Rapid Response

## Fast, relevant and nurturing customer interactions

1. Save deposits by enabling to address specific situational concerns
2. Reassure confidence by quickly responding to all inbound messaging.
3. Drive loyalty by using real-time Ai driven predictors of customer satisfaction



# Showing and Communicating Strength: Proactive Engagement

**Outreach to customers and market in the moment that matters.**

1. Proactive outreach to individuals, audiences and the market to bolster confidence
2. Use AI real-time insights to drive relevant and personalised messages.
3. Mitigate bank runs and risk of PR crisis by moderating online discussions as they happen.

# Revenue goals driven by **digital first** across the organisation

**1**

## **Sales**

Simplify the funnel  
Understand intent and timing  
Proactively adding value

**2**

## **Marketing**

Track and measure in real-time – sentiment, performance and paid vs. organic

**3**

## **Public Relations**

Governed sharing  
Opportunity identification  
Risk Management

**4**

## **CX**

Unified, orchestrated journeys  
Compliant  
Lead with Empathy

**5**

## **Service**

Focus on automation  
Deeply trained AI bots  
Related to sales initiatives



# AI Empowering Finserv: 3 Use Cases



## Customised Insights

Data distilled from any # of sources providing context driven insights & analysis



## Contextual Guidance: Next Best Action

AI generated prompts on best action and response driven by use-case and circumstance



## Personal Assistant

Purpose defined AI agent that will:

- Solve Individual Problems
- Answer questions
- Take appropriate action





1. To drive loyalty, trust is **at least** as important as performance
2. CX needs an **empowered** owner
3. **AI is a tactic**, not a strategy

# Thank you

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in action.**

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