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CONVERSATIONAL STRATEGY IN THE FINANCE AND BANKING INDUSTRY

Get in touch via email:
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Learn more:
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Conversational Strategy in the
Finance and Banking

As customer expectations of online service continue to evolve to more of a self-service model, so must the financial services industry. Customers want access to information - especially when it comes to their personal finances - at any time and in as efficient a process as possible. They want to ensure that they have insight into the status of their accounts, how much money is owing on loans or credit cards, and how their investments are doing. And they want to do it at any time, any day, including outside of branch hours or without having to wait on hold for a significant period of time, and they want the experience to be as seamless as possible.

Master of Code empowers financial service brands to reap the benefits of using Conversational AI solutions to increase customer satisfaction, retention, acquisition, and save time and money by automating their users' most common requests. Our team of **Conversational AI Experts** can help you understand which tools, channels, and services you need to bring a strong self-service model to your customers' self-service requirements. By understanding your needs, your customer's needs, and the different types of customers and services you provide, Master of Code is suited to help you build out a strategic plan to implement and grow a conversational plan for today and beyond.

With our experience we have seen some significant results...

50%
cost reduction per
interaction

50%
decrease in agent
attrition

85%
automation containment rate of
all engaged sessions over time

1.4M+ hours
customer wait times
saved in 12 months

Our Strategic Planning team will help:

Identify key use cases

Through actioning workshops, and conversation and data review, our team can identify high value use cases that will provide you the best impact and in what order to address them based on user need, necessary integrations, and complexity of variations of the conversational flows

Lay out a channel engagement plan

We can help you identify what works best to enhance your customer engagement and boost satisfaction, whether that be a single channel or an omnichannel solution and approach

Create a roadmap and prioritization practice

We'll work to provide the initial foundation for the first few iterations of the solution

Design an implementation plan

You don't want to do everything in one go, you need to make it iterative so you can get insights from real customer experiences faster, including ongoing support and training of your models

Identify the best technology platform

We can work within your current infrastructure or recommend something that provides the strongest support for the financial industry based on your needs
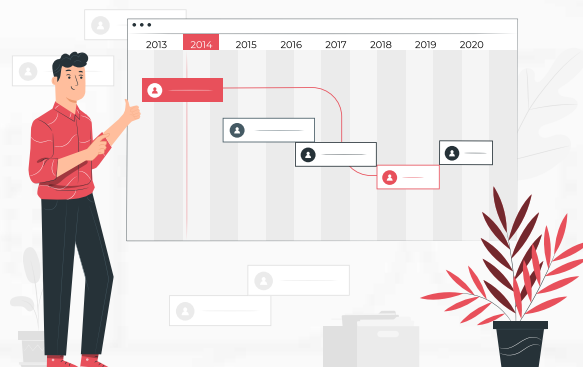
You already have a solution in place to engage with your customers. Maybe you focus on providing account information to your customers, but they want more. And you aren't sure if your current solution is up to task. Or maybe your service offering needs to expand from personal banking to also include investment information or requesting a new credit card. Our **Conversational Review** service can assist you in identifying your current state and positioning it within your vision - where you are in your journey, do you have the elements and integrations available for expansion, and even identify possible inefficiencies with some of your current flows. Our experienced team can align your current state with the next few steps in your growth and provide you our experienced insight as to what needs to happen to achieve the next step in your journey through Conversational AI maturity.

Your business and the collection of all of the services you provide is unique. Your Conversational AI strategy should be too. Don't invest in a solution that cannot scale and adapt with you and your needs. Get a solution that does what you need it to do, allowing it to become an extension of your team. Our Master of Code Conversational Strategists are happy to help you define, plan, and implement that vision. YOUR vision.

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BUSINESS VISION MEETS TECHNOLOGY MASTERY

Contact our team

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