

DATASHEET

How IntelPeer’s AI-powered automation improves CX for the finserv industry

Deliver generative AI and self-service capabilities for maximum returns

Is your institution meeting expectations or falling short due to inadequate technology, manual processes, and staffing shortages? Today’s customers expect a hyper-automated, personalized, and connected digital experience where they can get immediate answers and make transactions anytime, anywhere.

Deliver fast services to your customers using generative AI, omnichannel, and self-service automation capabilities. With IntelPeer, your institution can engage with customers on their preferred channels – including phone, SMS, chat, and social media. Backed by an industry-leading reliable and secure platform, IntelPeer proactively provides reliable fraud prevention, customer identity verification, and customer data protection.

Experience these benefits and more:

- ✓ Improved customer experience with generative AI
- ✓ Shortened call resolution times and better call completion rates
- ✓ Elevated customer satisfaction and retention
- ✓ Eliminated downtime and outage costs
- ✓ Optimized productivity and decreased staffing costs
- ✓ Decreased appointment cancellation rates
- ✓ Streamlined bill payment and revenue collection
- ✓ Improved customer survey response rate



TRANSFORMING FINSERV EFFICIENCY

IntelPeer’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.



[Click here for more information](#)

Deliver reliable communications and customer service to your customers, safeguarded by high-security-powered technology, including:

- Fraud protection
- 99.999% reliability
- 3x redundancy
- Two-factor authentication
- PCI compliance
- Phone number masking
- Data encryption
- Spam protection



IntelPeer’s financial services offer includes:

1) Use cases powered by generative AI

Transaction management

Transaction status, deposit/withdrawal notifications, new service sign-up, card shipping status, loan payments/interest accrued

Loyalty management

Special offers to existing customers, notification on status of points earned for rewards, post-call survey to measure customer satisfaction

Appointment management

Automate appointment scheduling, reminders, and rescheduling; significantly decrease missed appointment rates

Smart IVR/cloud-based routing

Omnichannel customer support AI and automation capabilities to route calls to best agent, featuring natural language processor (NLP) and live chat

Contextual offers

Automated SMS promotional offer delivery, phone, or chat delivery of customized offers based on account activity/status, purchase behaviors, credit score, or customer sentiment

Self-service

Includes: Payment processing • Smart IVR • Short codes • Order management • Update account details • Chat bot from within social application of customer choice (i.e., Facebook, WhatsApp)

Account status

Purchase notifications, low balance or negative balance alerts, credit alerts, expiring cards, balance status, loan status

Payment automation

Payment reminders and late notices via SMS and phone, phone payment processing

Fraud protection and alerts

Two-factor authentication, fraud alerts, transaction verification requests via SMS

2) AI-powered built-in capabilities

Application and CRM integration	High security	Emergency preparedness	Managed Services
Trigger communications based on data look-ups, log communication activity automatically into applications or CRM	Data encryption, fraud monitoring, alerts and protection, transaction authenticity requests via SMS, two-factor authentication, spam filtering	Customer and staff notifications, business continuity, 3x redundancy and e911, Smart IVR for automated routing and queuing during high-call volume times	24/7/365 customer support and managed services capabilities from the engineers who built IntelPeer’s CAP

For more information on IntelPeer for financial services, visit intelepeer.ai/how-we-deliver/financial-services/.



Scan the QR code or [click](#) to view

Are you ready to transform your finserv organization?

IntelPeer is offering a generative AI and automation Customer Interaction Intent Study to 25 lucky companies. The complimentary study is valued at \$25,000 and will help you accelerate your customer engagement. Reserve a Customer Interaction Intent Study with IntelPeer now.

About IntelPeer

IntelPeer simplifies communications automation through advanced AI-powered solutions, helping businesses and contact centers reduce costs, enrich the customer experience, and accelerate ROI. Its AI-driven Communications Automation Platform works seamlessly within existing business software and infrastructure, enabling brands to automate complex processes quickly and effortlessly. Built for business users, IntelPeer’s vendor-neutral platform leverages world-class generative AI and analytics, empowering businesses to proactively resolve potential pain points and maintain context across channels and throughout the orchestrated customer journey.