



How a Leading Financial Services Company Transforms Customer Service with AI

A Case Study

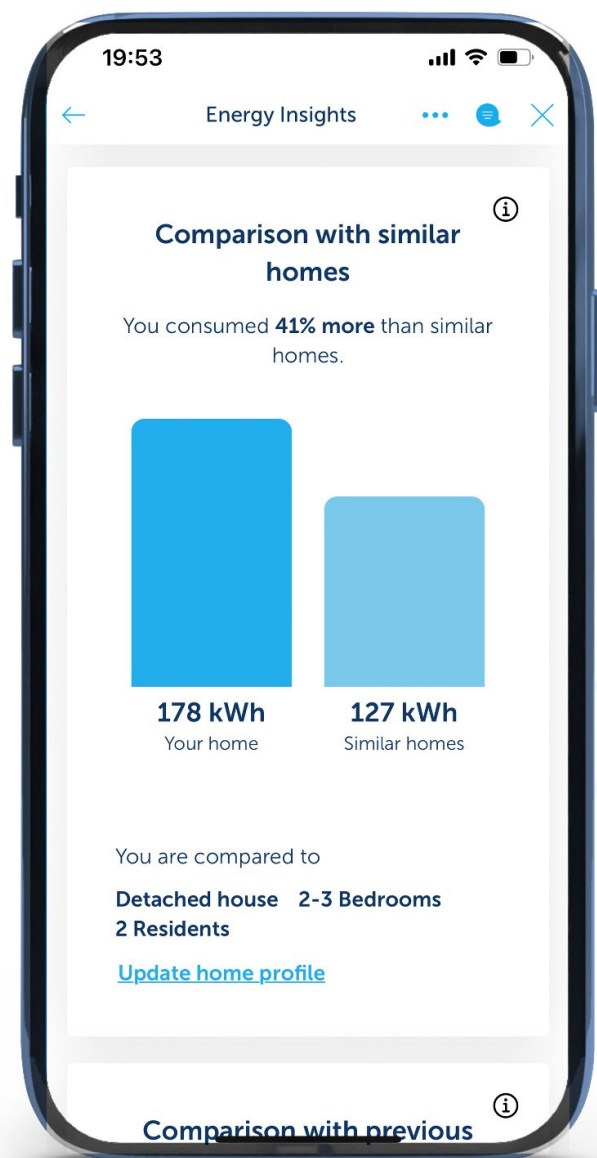
Introduction

At a top financial services company, a new digital assistant named "Asa" transforms customer service. Available on every screen of the company's mobile app, Asa isn't just a typical voice-enabled assistant that reacts to user commands — it's a proactive part of the customer experience.

Asa sends personalized, proactive messages to help customers manage their finances more effectively. These messages can offer timely financial advice, simplify transactions, or explain account features.

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This approach changes how customers think about and interact with their financial service provider, making their digital experience faster and more personalized.



Approach

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Challenge

Despite its advanced capabilities, Asa faced several challenges that limited its effectiveness:



Scalability was a major issue as customer demands and interaction volumes increased.



The **system's inflexibility** made it difficult to personalize Asa for specific customer needs or integrate with new digital services.



A **lack of transparency** in data management restricted the company's ability to refine and optimize the assistant's responses.

These challenges prevented Asa from delivering consistently high-quality customer service.

Solution

The company initiated a strategic partnership with Rasa to overcome these obstacles, whose conversational AI technology promised greater flexibility, scalability, and control.

This collaboration enabled several enhancements:



Asa was **integrated across various customer interaction platforms** including the company's mobile app and website, ensuring a cohesive user experience.



The development team adopted an **agile methodology**, rolling out updates bi-weekly to rapidly enhance functionality and user engagement.



Through **in-depth analysis** of extensive customer interaction data, Asa's responses were continuously refined, making the assistant more intuitive and helpful.

Outcome

Asa's overhaul significantly elevated its operational performance:

- ✓ **Increased autonomy** to handle a wider range of inquiries independently.
- ✓ Began to issue **proactive notifications** to assist customers before they even reached out, effectively anticipating their needs based on behavioral cues.

Here are some examples of proactive reachout:

When purchasing driving lessons:

- ➔ Asa asks if the user want to add their child to the insurance policy. This is completed after only a few clicks.

Third-party integrations:

- ➔ Users can purchase cinema or train tickets through directly with Asa.

- ➔ More train tickets are sold using Asa than through the train companies' own apps.

Proactive customer support:

- ➔ Asa contacts customers proactively, such as when they get your PIN incorrect three times and then offers assistance.
- ➔ In specific regions, Asa helps customers find cheaper gas prices by sending proactive insights based on their spending patterns.

Results

The improvements in Asa's functionality have been reflected in its performance metrics since 2021:

The platform now serves over **1.5 million users**, with **600,000 active** monthly users.

It has executed more than **10 million** proactive engagements.

The system successfully resolves **58%** of interactions autonomously and boasts a **90% accuracy rate** in understanding user queries.



Future Goals

The company plans to further enhance Asa's capabilities by incorporating Rasa's latest CALM technology, which promises even greater precision and adaptability in handling complex inquiries.

As the company continues integrating Asa deeper into its overall customer service framework, it remains committed to leveraging AI to streamline operations and improve customer interaction quality