Solution Presentation

Use-cases for Chatbot

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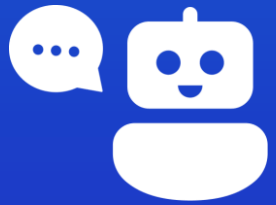
Customer Support Use-cases

- WhatsApp Bot
- Website Bot
- Alexa and Google Assistant Bot



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Customer Support on WhatsApp

Bot for Customer Support on WhatsApp

All common queries of the customers could be answered by an automated bot on the **most popular channel - WhatsApp.**

- Generic queries, account related queries.
- Insurance: premium due date, premium due amount, policy status.
- Stock broking: live stock prices, portfolio valuation.
- Mutual Fund: KYC status, account statement, branch locator.

Business Impact

- Reach out to customers on a channel they very well know of - WhatsApp
- Service customers 24x7

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Customer Support on Website

Bot for Customer Support on Website & Mobile App

Customers ask a lot of common queries that can be instantly answered by a bot.

- Generic FAQs
- Credit Card (Due date, Due Amount, Last 5 Transactions, pay bills)
- Check Account Balance, Mini Statement, Account Statement, etc.
- Transactions, Customer Details, Product Details, etc.

Business Impacts

- Instant resolution to user's common queries
- Time-saving approach for query resolution

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VoiceBot on Google Assistant and Alexa

VoiceBot on Alexa and Google Assistant

- Users can ask queries on Alexa and Google Assistant.
- It can provide the user with instant voice responses.
- The users can transact by simple voice inputs.

Business Impact

- Better customer engagement
- Easy and quicker resolution of queries
- Additional customer touch-point
- Voice capability makes it user friendly

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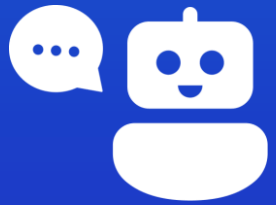
Sales Use-cases

- Form Assist for online buy journeys
- Bot for non-contactable leads
- Lead Generation Bot



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Form Assist on online buy journeys

Bot for Form Assist (Website and Mobile App)

- Form Assist automatically detects inactivity when the user is stuck on a particular field, while filling a form and pops up on the screen of the customer.
- The bot **proactively shows the contextual meaning** of the field
- The bot can guide the customer about the specific fields where they need help.

Business Impact

- Better user experience since the bot provides contextual assistant
- Reduced drop-offs & less inbound calls
- Improved support at the point of sale and service

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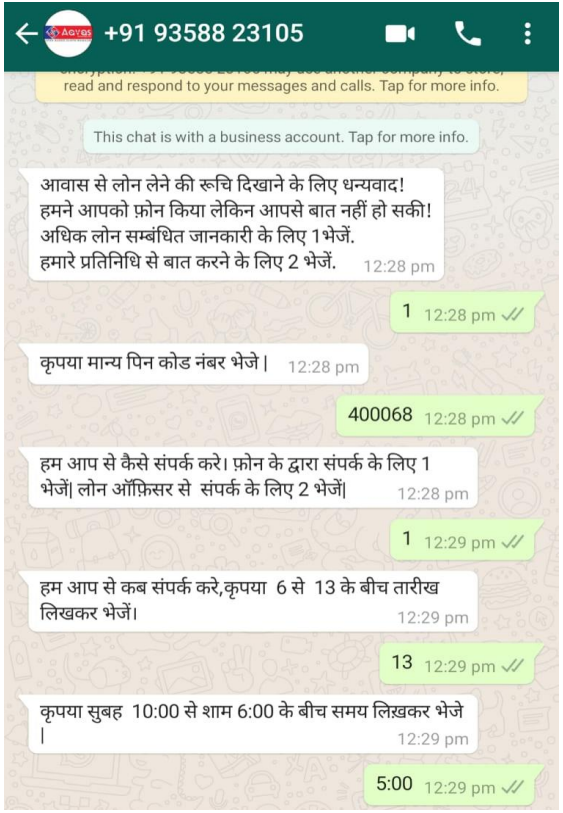
Bot for Non-Contactable Leads

Bot for Non Contactable Leads (WhatsApp)

- The bot sends a whatsapp message to users who are not contactable.
- The customer can reply to either set up a meeting or call from Sales Manager.
- The bot is implemented in Hindi Language

Business Impact

- Automating follow up with the customers
- Better churning of leads
- Support for vernacular languages



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Loan Recovery & Collections

Bot for Loan Recovery

- The customers who have defaulted on their EMIs will be sent a message with bot link
- The customer clicks on the bot link and enters their details
- The list of defaulted EMIs/pending EMIs is shown
- The bot shows ramifications of not paying EMIs on time
- The customer can pay the loan or express their reason for not paying the EMIs
- The bot can also redirect the customer query to a human agent(call/chat/meeting)

Business Impact

- Highly scalable solution to contact the loan defaulters
- Automated collections channel loan recovery

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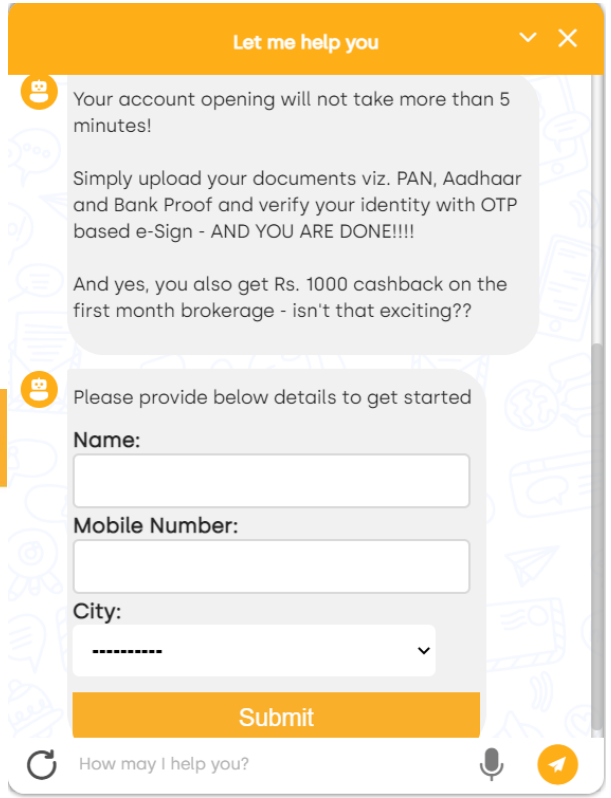
Lead Generation Bot

Bot for Lead Generation (Website, Mobile App)

- The Lead Gen Bot pops up on detecting user inactivity.
- The Bot detects the page and contextually probes the user.
- The Bot then proactively collects user details.

Business Impact

- Proactively generate qualified leads
- Better quality leads
- Better conversion of leads



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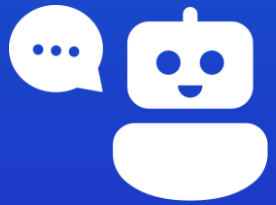
Internal Use-cases

- Bot for Relationship Managers
- Bot for Feet-on-Street (FOS)
- Bot for Customer Support Executives



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Bot for Customer Support Executives

Bot for Customer Service Agents (Website, WhatsApp, Mobile App)

- Customer service agents have high-attrition rates and their training time varies from 3 to 4 months. Despite all these efforts, agents contact their team leader for queries that they don't have answers to.
- If the agent is not aware of the resolutions, a wrong resolution is provided.
- This process can be automated by providing a Bot for the customer service agents wherein agents can type the query give accurate answers to customer's common queries.

Business Impact

- Correct and Standardized responses
- Low response time for the customers, rapid answers to queries
- Less training time for training the agents

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Bot for Feet-on-Street

Bot for Feet-on-Street (WhatsApp, Mobile App)

- It's difficult for RM to remember all the products and services offered.
- Agents with incomplete knowledge have to call the product team to get answers.
- If a Bot can be provided to these agents, they can ask any query pertaining to products and services.

Business Impact

- Providing standardized answers to users/customers
- Provide support to agents to ease off their sales process
- Less training time required to teach the agent regarding products
- Reduce chances of mis-selling.

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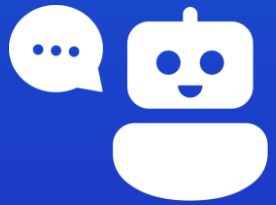
HR Use-cases

- Bot for Job Applicants (Recruitment)
- Bot for Employees (Internal HR)



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Bot for Job Applicants (Recruitment)

Bot for Job Applicants and Recent Joinees (Website, WhatsApp, Google Assistant, Alexa)

- The Job Applicants ask a **lot of common queries**, which a Bot can **automatically answer.**
- Generic queries before joining - Date of joining, Place of posting, Salary details, Perks, and benefits, taxation, the culture of the company, about senior management, etc.
- Candidates can **upload documents** (ID Proofs) - Passport, Aadhaar Card, PAN card, etc

Business Impact

- Automating common applicant queries
- Less inbound calls to the hiring managers
- Standardized responses

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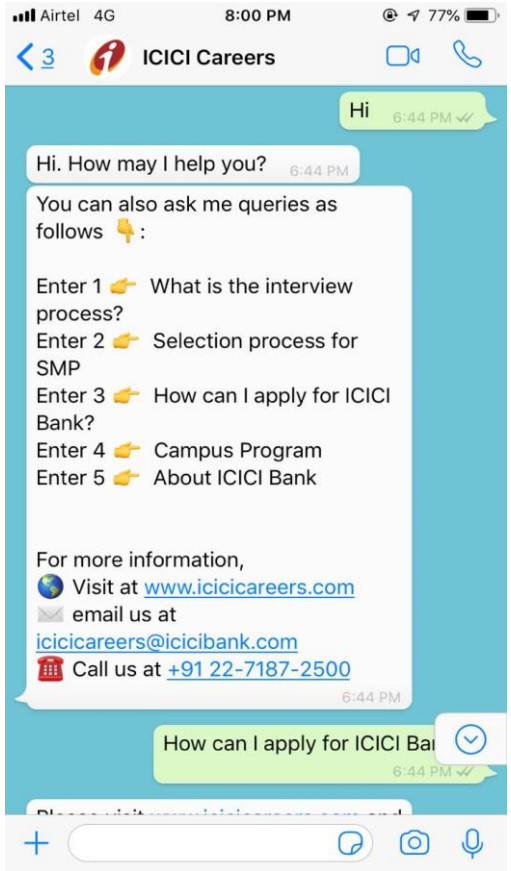
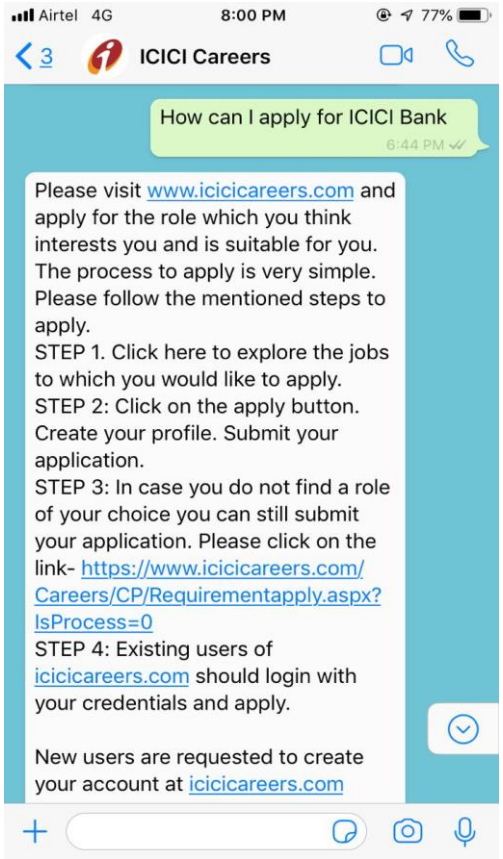
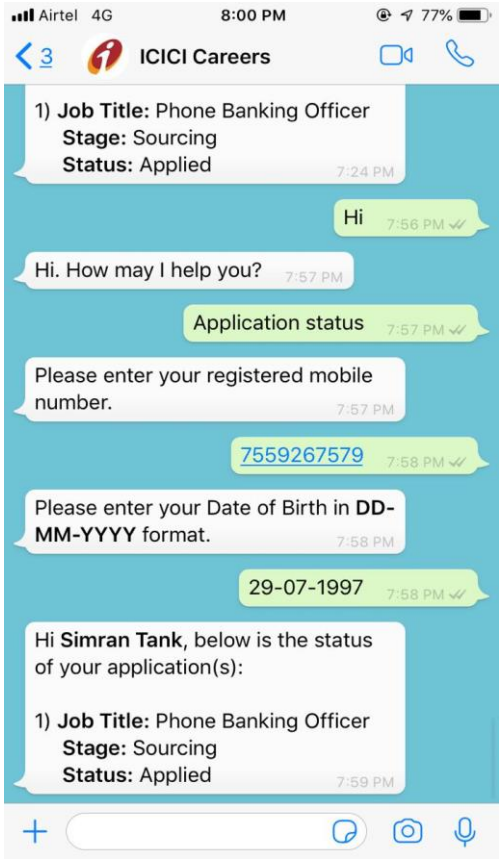
Applicants can ask generic queries and also track their applications







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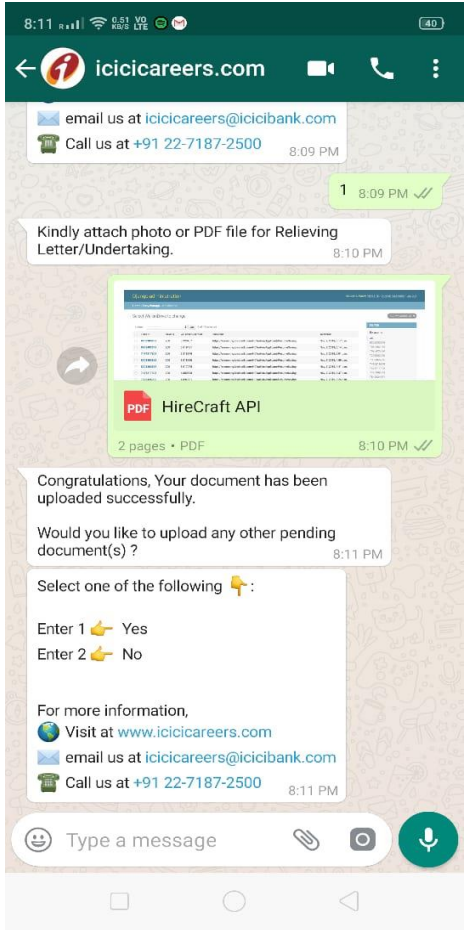
Applicants can also upload their documents such as PAN, marksheet, certificates, etc.

- Applicants can upload relevant documents.
- The bot first authenticates the user and asks the user which document they would like to upload



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Bot for Employees (Internal HR)

The HR team receives a lot of common, repetitive queries that can easily be automated by a bot.

- Leaves (sick leave, maternity leave, etc.)
- Apply for leaves, muster, late punch, etc
- Payroll related queries
- Register a complaint of harassment, etc
- Salary Slip
- Promotion
- Perks and Allowances
- PF related

Business Impact

- Automation of common HR-related queries
- Quick resolution to employee queries
- Time-saving approach for query resolution and thus resulting in more productivity

Thank you

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