



ACCESS SofTEK, INC

# Conversational Banking

## From Self-Service to Full-Service

At its core, Conversational Banking is the enabling of a two-way digital experience. Access Softek views this two-way digital experience as an opportunity for the client to:

- Self-serve and fulfill their banking needs using an AI powered ChatBot OR
- Be served directly by a Contact Center associate via Live Chat or Video Chat

Each is secure, reliable and easy to use. Individually or bundled together, while offering the customer or member immeasurable convenience, these solutions offer you improved customer or member experience and loyalty, reduced expenses, increased opportunities for sales and cross-sales, deepened understanding of client pain points and shortened problem resolution times

## Features

### ChatBot

- Rich responses including images
- Deep linking capabilities
- Extensive out-of-the-box knowledge base, tailored to your institution

### Live Chat

- Instant authentication
- Ability to service multiple customers or members at one time
- Notifications for unread messages
- A history of prior chats with the customer or member
- Easy conversion to Video Chat

### Video Chat (For the Credit Union):

- Video call on demand to needed department or directly to the assisting Contact Center associate
- Native mobile app integration
- Screen share for quick and effective issue resolution delivery
- DocuSign integration
- Call recordings and archive for time needed
- Configurable list of department/specialists

### Video Chat

#### (For the Contact Center Associate):

- Instant authentication
- Alignment box—awareness on how member is seeing you on their screen
- Missed call notifications with member info
- DocuSign integration to assist with real-time documentation completion and signature requests

For more information about how your credit union can engage members and non-members with this valuable resource, email [consult@myleverage.com](mailto:consult@myleverage.com).

**LEVERAGE**  
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