

6 Reasons Why Financial Services Is Embracing AI

AI is transforming Financial Services, enabling better customer experiences with greater efficiency.



Realizing ROI for AI & Automation

AI investment is a high priority for customer service leaders due to its transformative potential.

61%

of banking executives plan to increase investments in AI within the next 12 months¹



Digital Choices for Customers

Financial Services can meet rising customer expectations for digital-first self-service.

72%

of respondents "agree" or "strongly agree" that AI tools will provide easy, convenient self-service in the near future²



Effortless Self-Service with AI Agents

Provide seamless, 24/7 assistance that reduces frustration and helps customers anytime, anywhere.



50% call containment
for quick, hassle-free resolutions³

24/7 availability
for fraud reporting, password resets, account reviews, etc

Personalized Support for Agents

AI empowers agents to focus more on each customer by supporting them during and after conversations.



40%

reduction in after call work time with agent assist tools⁴

[Read our E-book](#) on the uses of GenAI to improve CX and workforce efficiency in Financial Services.

Smarter Trust and Compliance

GenAI enables Financial Services to rethink and optimize their Quality Assurance processes.



5-10%

improvement in CSAT⁵

50%+

cut in QA costs⁶

Gain Greater Control

GenAI unlocks insights hidden in your conversation data.



66%

of leaders believe generative AI will have a meaningful impact on customer intelligence and analytics⁶

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1. "AI in Banking: Benefits, Risks, What's Next," Tech Target, 2024.

2. "Survey finds bank customers lack trust in AI, chatbots for financial advice," ABA Banking Journal, 2024.

3. "Central Bank Cuts Call Volumes in Half," Five9, 2024.

4. "TruConnect Leverages AI to Reduce Costs and Optimize Customer Service," Five9, 2024.

5. "AI mastery in customer care: Raising the bar for quality assurance," McKinsey & Company, 2024.

6. "AI in the Contact Center: A Roadmap to Success and Transformation," Metrigy, 2024.