

INDUSTRY | FINTECH

Fintech company



This company offers businesses a comprehensive, web-based suite of payroll, human resource and benefit administrative services backed by dedicated support specialists.

Challenge

The client faced challenges with their previous Einstein Bot, as it wasn't delivering the level of support and information needed to assist website visitors effectively. The bot was limited in its capabilities, leading to suboptimal user experiences and increased reliance on human support. They wanted to enhance the website's self-service options by providing more robust, relevant information to visitors, ultimately improving customer satisfaction and reducing support queries.

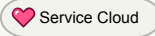
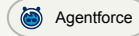
- The previous Einstein Bot was ineffective at providing useful information to website visitors.
- Customers struggled to find relevant and detailed information on the site.
- Limited bot capabilities led to increased demand for human support.
- The need for a more comprehensive, user-friendly solution to improve self-service and engagement.

Solution

To enhance the user experience and provide more robust support, we implemented the following solutions:

- **Service Agent** – Created an agent that references all of their public-facing knowledge base articles and 100 PDF files in a Data Library.
- **Dynamic FAQ** – The agent now answers a wide range of common questions, providing visitors with more comprehensive and relevant information.
- **Escalation to Live Agents** – The agent can seamlessly escalate conversations to live agents when further assistance is needed.
- **Case Management** – Implemented a case management system allowing website visitors to create and update cases directly within the system.
- **Improved Self-Service** – Visitors can find answers to their questions and manage issues independently, reducing the need for live support.

PRODUCTS USED



Outcome

By the end of the project, our client could:

- **Provide Robust Self-Service** – Visitors can access detailed, dynamic FAQs, improving their ability to find relevant answers without needing live support.
- **Enhance Customer Experience** – The agent offers comprehensive and accurate information from knowledge base articles and PDF files, meeting a wider range of user needs.
- **Seamless Escalation** – If needed, customers can be smoothly escalated to live agents for more complex queries or personalized support.
- **Streamline Case Management** – Visitors can create and update their cases directly on the website, simplifying issue resolution and tracking.
- **Reduce Support Load** – By providing more self-service options and accurate information, the reliance on live agents is reduced, improving efficiency and customer satisfaction.

