directlink

CONNECT BETTER & SERVE FASTER

corelation

13th Annual Client Conference

AI-Powered Voice Banking for Credit Unions

Automating 1-in-3 Calls with a Prebuilt Corelation KeyBridge Integration

directlink Audio Banking with **Conversational AI**

AI-Powered Voice Banking Platform - offering 24/7/365 account access by phone

80% of banking inquiries pertain to only 20% of banking scenarios from members	Break away from menus and fixed call paths by leading with KeyBridge-connected AI
Member Authentication	Dialog Management Solution
Account Balances & information	Integrates with Existing Phone System
Transaction History	Intelligent Routing & Dynamic Flow
Payments & Transfers	Intuitive User Experience
Miscellaneous Maintenance	KeyStone-core Integrated Experiences
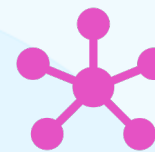
directlink AI Content Management **Portal**

Empowering Credit Union Employees – to own and operate an AI Virtual Banker

directlink

- Home
- Analytics
- Channels
- FAQs
- Skills
- Commands
- Publish
- Agent
- Admin
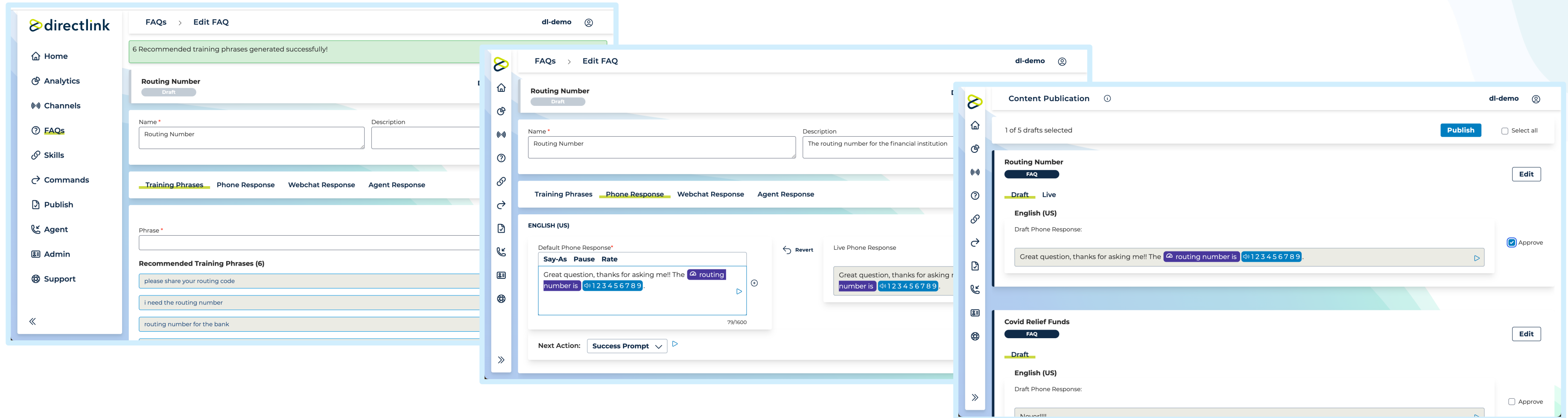- Support

FAQs > Edit FAQ   dl-demo

6 Recommended training phrases generated successfully!

Routing Number
Draft

Name *
Routing Number

Description

Training Phrases   Phone Response   Webchat Response   Agent Response

Phrase *

Recommended Training Phrases (6)

please share your routing code

i need the routing number

routing number for the bank

FAQs > Edit FAQ   dl-demo

Routing Number
Draft

Name *
Routing Number

Description
The routing number for the financial institution

Training Phrases   Phone Response   Webchat Response   Agent Response

ENGLISH (US)

Default Phone Response*
Say-As   Pause   Rate
Great question, thanks for asking me!! The 🔊 routing number is 🔊 1 2 3 4 5 6 7 8 9

79/1600

Revert

Live Phone Response
Great question, thanks for asking number is 🔊 1 2 3 4 5 6 7 8 9

Next Action: Success Prompt ▼

Content Publication ⓘ   dl-demo

1 of 5 drafts selected   Publish   ☐ Select all

Routing Number
FAQ   Edit

Draft   Live

English (US)

Draft Phone Response:
Great question, thanks for asking me!! The 🔊 routing number is 🔊 1 2 3 4 5 6 7 8 9

☑ Approve

Covid Relief Funds
FAQ   Edit

Draft

English (US)
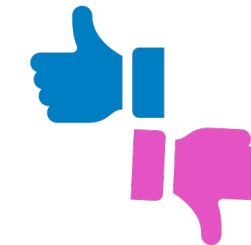
Draft Phone Response:
Never!!!!

☐ Approve

Manage Knowledge
Provide, generate, and review samples of member inquiries to build a knowledge model about your CU.

Draft Precise Dialog
Determine what the AI says, how it sounds, and when it should play (including schedules, holidays, and campaigns)
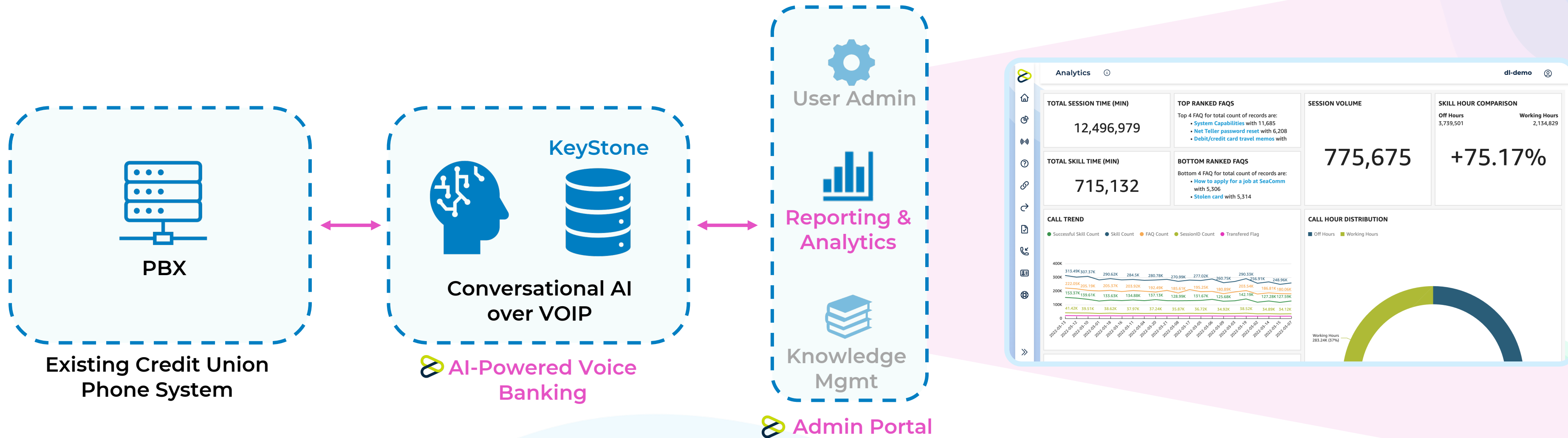
Audit AI Changes
Ensure only approved knowledge and language is ever provided to members via a content publication workflow

© 2024 Directlink

directlink **Results & Benefits**

90 Day Onboarding: Core-connection, Content Management, and Acceptance Testing

Members

24/7/365 Access
Access to real-time assistance for banking queries with **+10% increase in calls served with new calls overnight**

Reduced Hold Times
Member call hold times during peak operating hours reduced to reach a live agent by **+30%**

Streamlined Transactions
Efficient handling of routine banking tasks, saving time and effort with **+92% recognition rate**

Credit Unions

Operational Efficiency
Automated routine inquiries and transactions – **1-in-3 calls to credit unions handled using AI**

Augmented Center Hours
Credit Unions may **reduce or expand** operating hours to optimize staffing schedules and redeploy agents to higher value positions

Data Insights
Managers know precisely where members face challenges and have self-service tools to **enhance the AI themselves**