

The New Conversation Life Cycle

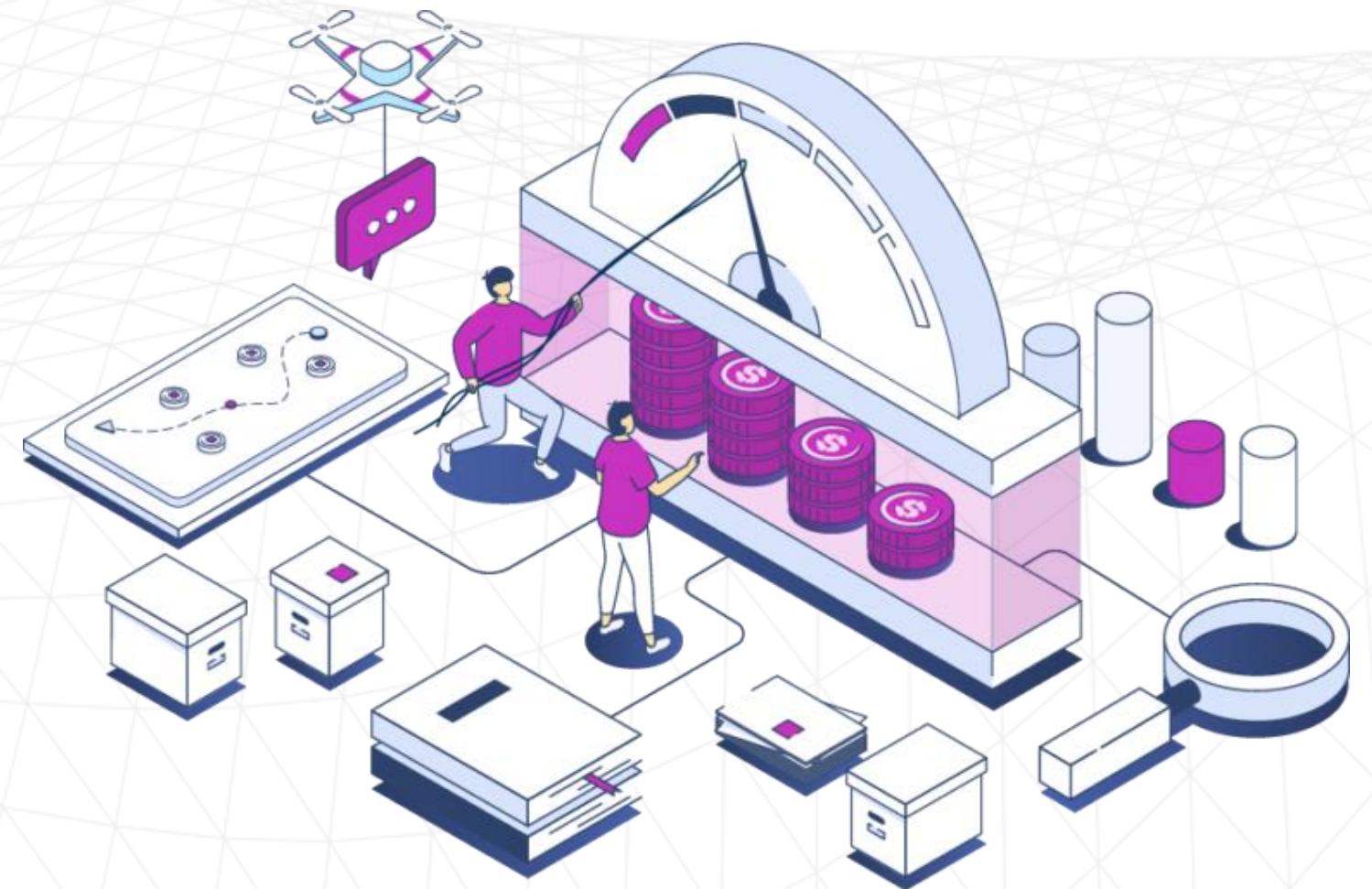
AI in the FI Contact Center



Agenda

Reimagining Contact Centers with AI-Powered CCaaS

- 1 Intros
- 2 New Caller Experience
- 3 New Agent Experience
- 4 Adopting AI
- 5 AI-Powered CCaaS Offerings
- 6 Q&A





Directlink is a Conversational AI platform purpose-built for community financial institutions. Our voice banking and conversational solutions leverage AI to enhance customer interactions, streamline operations, and provide personalized banking experiences wherever customers prefer to bank.



Ben Nichols
Co-founder
COO



Centurion CARES delivers customizable, cloud-based contact center solutions for financial institutions. CARES ConnectX and CARES Contact Center offer advanced ACD, IVR, predictive dialing, skills-based routing, screen pop, real-time monitoring, and remote agent support with complete administrative control.



Kirk Wormington
President & CEO

A Partnership Delivering One Platform for Service Excellence



Reimagining the Contact Center

How traditional telephony, digital communications, and AI harmonize

Omnichannel
Industry
Trajectory

Tightly
Integrated
Solutions

Scalable
Operational
Efficiency

Improved
Service
Experience

AI-Augmented
Employee/Agent
Experiences

The New
(AI) Digital
Transformation





Beneficiaries of AI-Powered CCaaS

Customers, Members, Agents, Managers, and IT



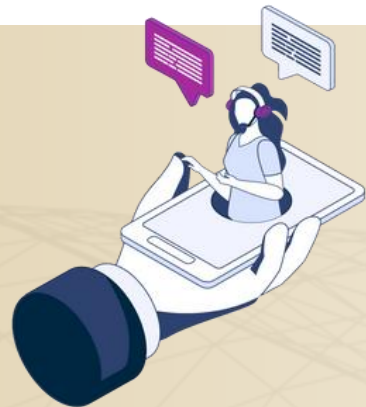
Customers

- Self Service
- Reduced time in queue
- Increased CSAT



Management

- Increased Employee Retention
- Higher FCR
- Cost Efficiency



Customer Service Agents

- Lower call volumes
- Focus on higher value tasks
- Increased Efficiency



IT Staff

- Reduced Support Load
- Simplified Operations
- Faster Issue Resolution



Benchmarking Traditional Workflow

What we've seen over the last decade

Avg Handle Time: 6 Min

Handle Time

Inbound communication

Touchtone auto-attendant

Agent queue & hold messages

Agent manually verifies caller

Agent supports request

Agent resolves request

Call wrap, notes, & disposition

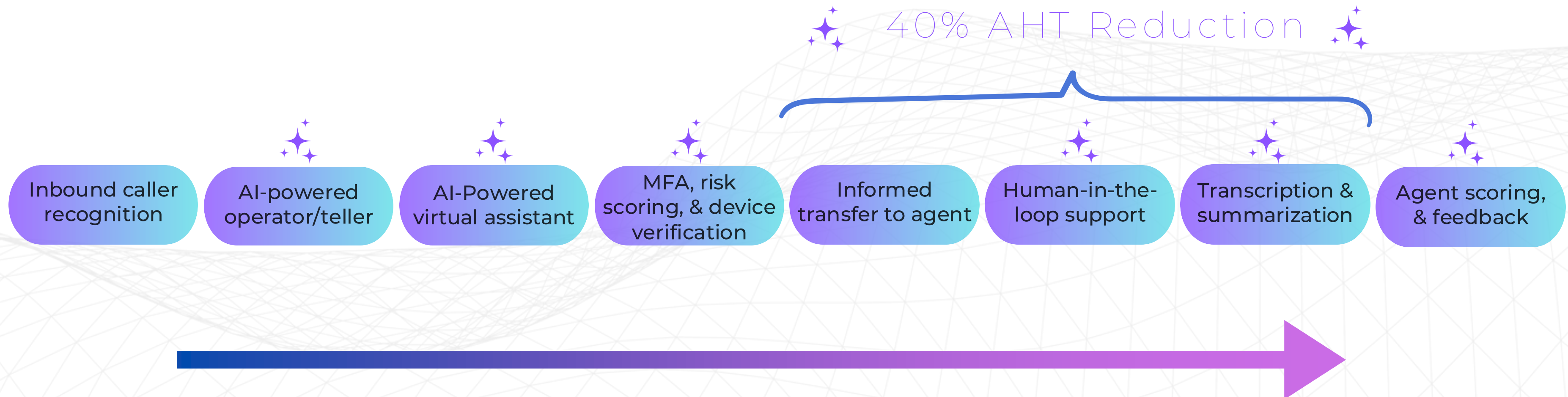
Analysis, QA, & agent training



Benchmarking AI-Powered Integrated Workflow

What's possible now with AI and automation

Avg Handle Time: 4 Min





A New Workflow





The Caller's Experience

The New AI-Powered Workflow

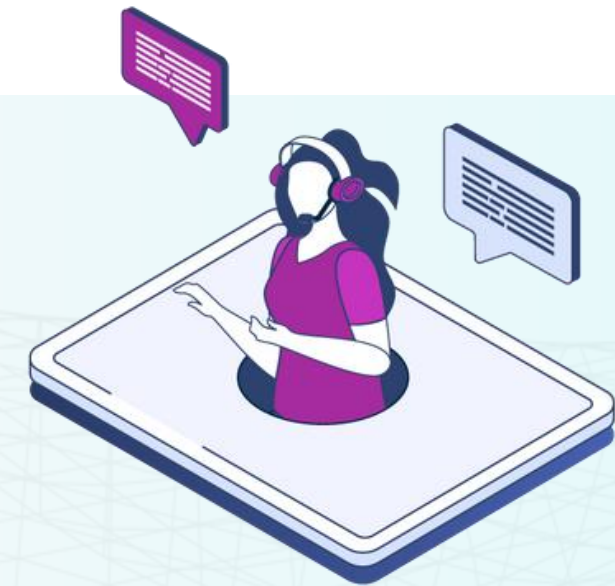
Virtual Operator



Using conversational AI to collect, understand, and route calls to the right agents, with the right skills, to resolve their issues.



Virtual Banker



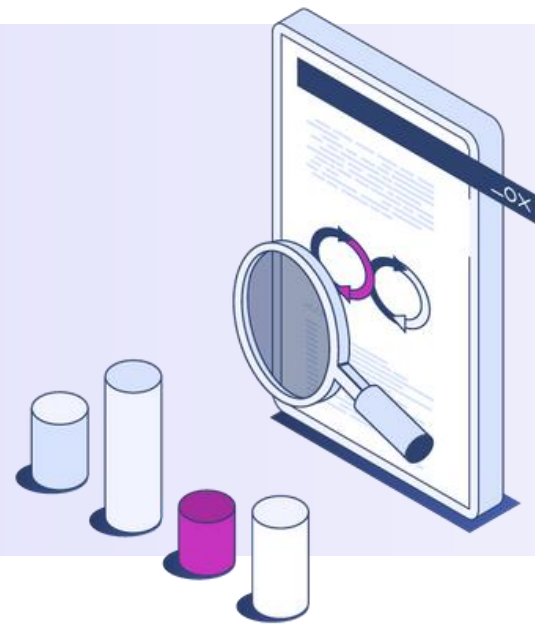
Using Fintech-integrated AI to authenticate callers, perform transfers, speak account and transaction data, while also providing answers to frequently asked questions.



The Agent Experience (continued)

The New AI-Powered Workflow

Informed Live Agents



Post Call Actions



Authenticated callers reach live agents who know the call risk score, summary, and sentiment.

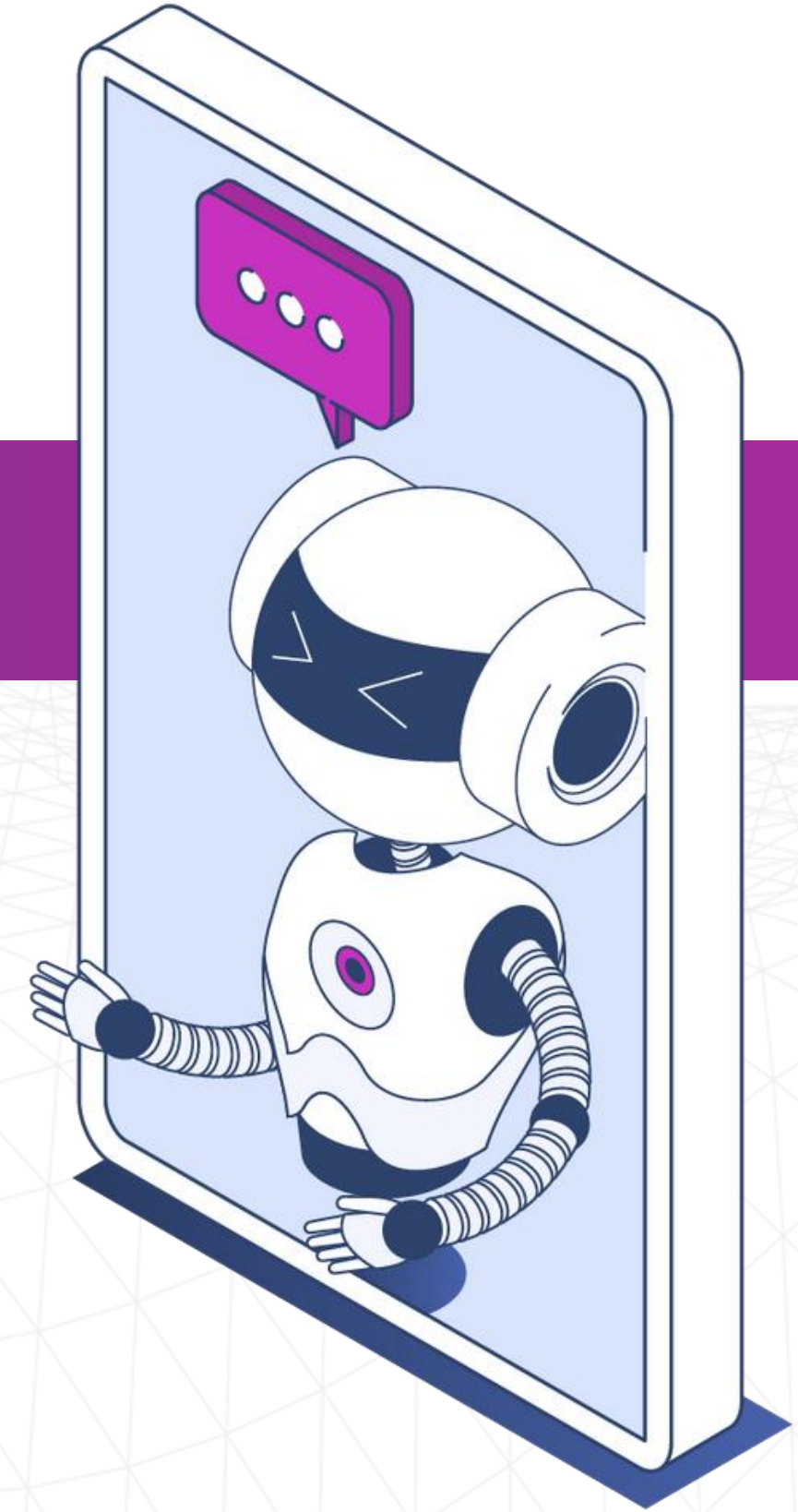
Real-time agent assistants further save time and provide a better caller experience.

Call wrap-up occurs automatically so that live agents can efficiently take the next call in queue.

Every call is scored for adherence and outcomes, while agents get feedback within minutes of their last call.



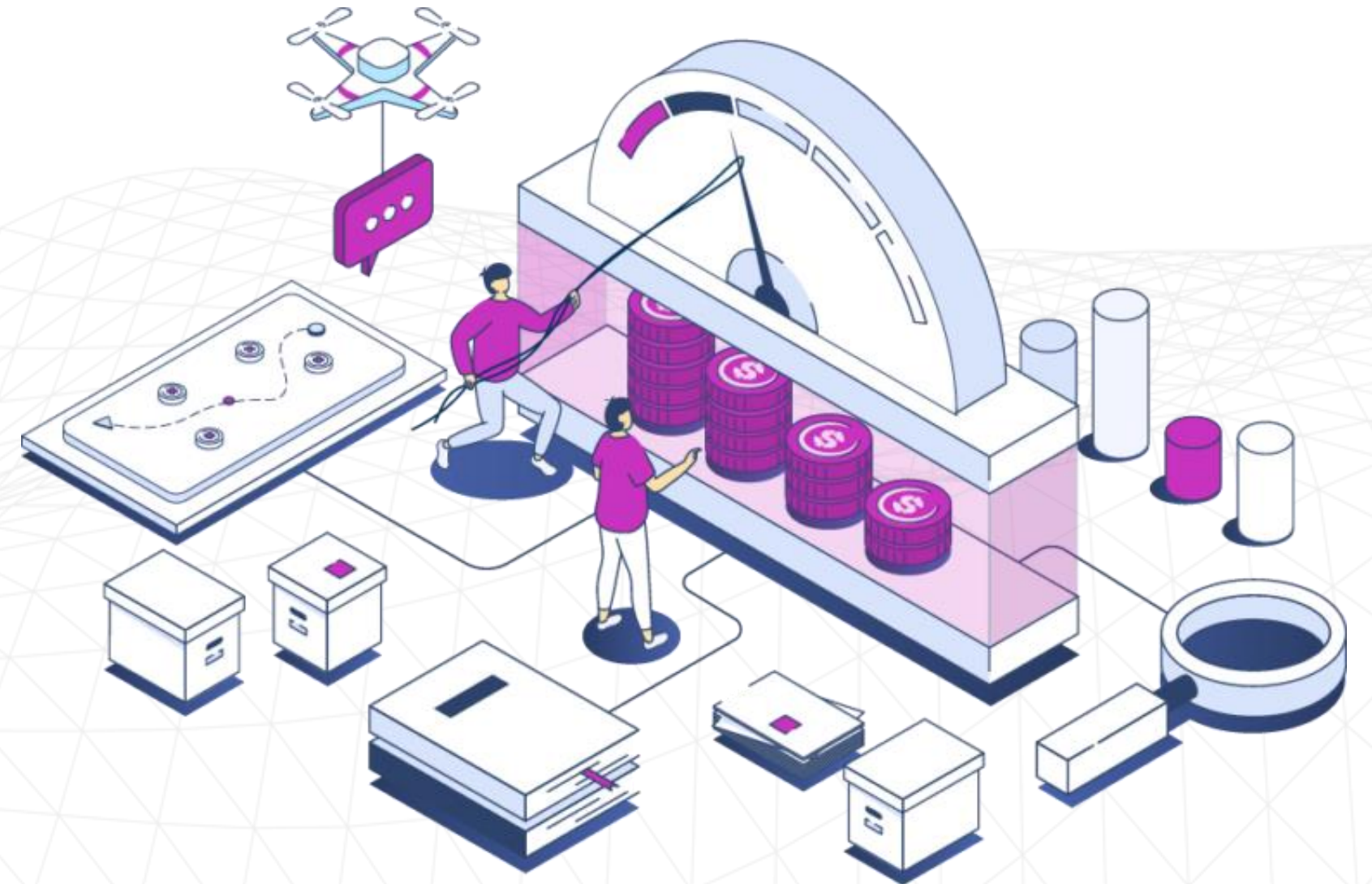
Adopting AI





AI Implementation Considerations (Internal)

- #1 **Begin with Business Impact**
- #2 **Demystify the Technology**
- #3 **Align Across Departments**
- #4 **Empower Champions**
- #5 **Frame AI as Augmentation**





AI Implementation Considerations (External)

Trust from your community is your competitive edge. As AI enters the consumer experience, it must be done in ways that feel consistent, transparent, and respectful.

Transparency builds confidence

AI should reflect your brand voice

Privacy and ethics matter

Human-in-the-loop design

Consistency creates loyalty

Encourage Authentic Interactions





Regulatory Landscape

Do you have an AI policy?

Transparency
& Explainability

Consumer
Protection &
Fairness

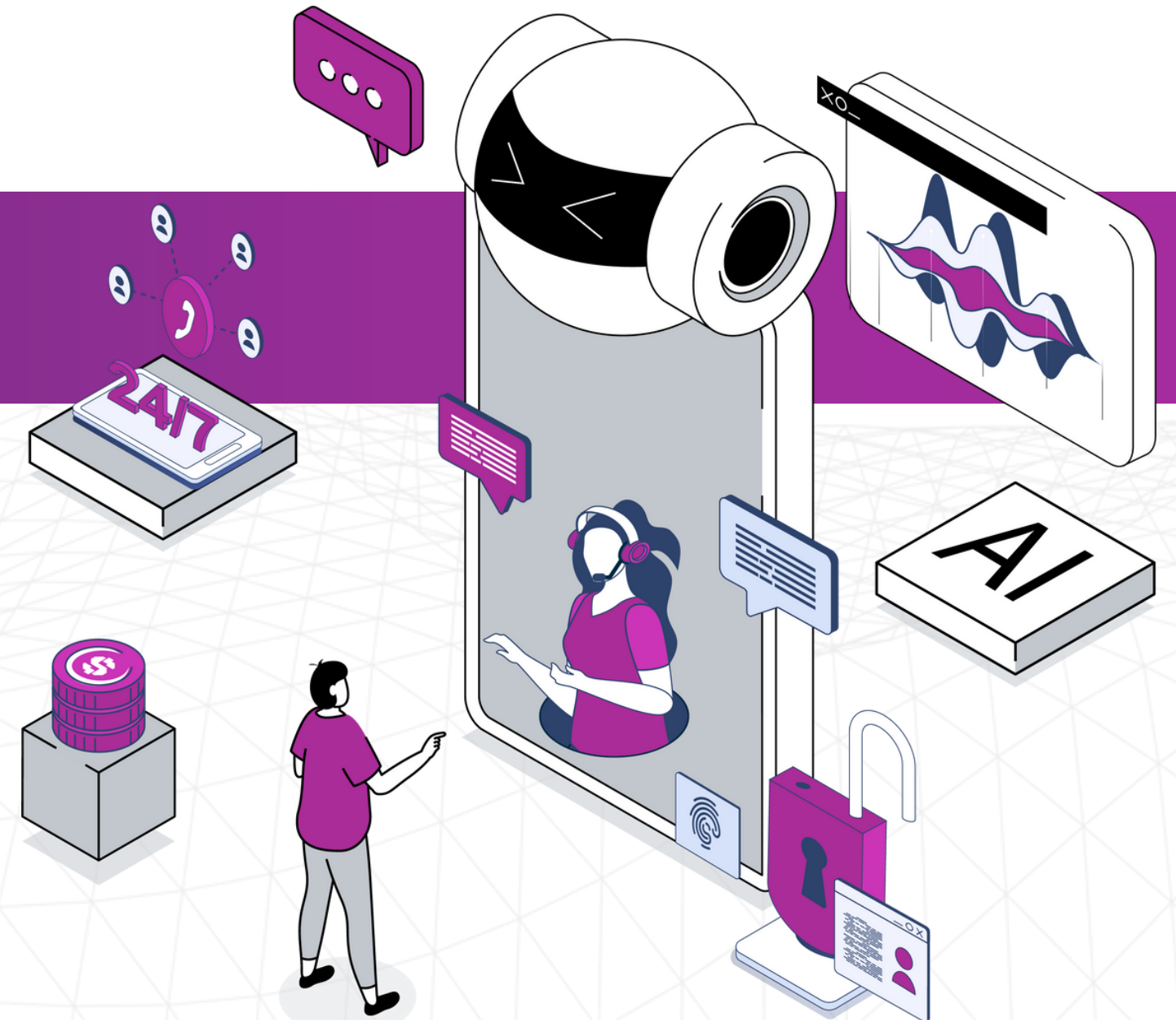
AI-Regulations
Under
Development

Data Privacy
& Security

Compliance
Monitoring



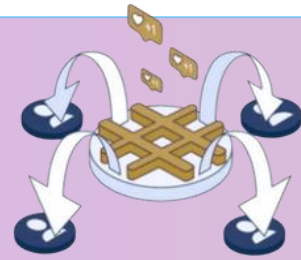
AI-Powered CCaaS





Centurion CARES UCaaS & CCaaS

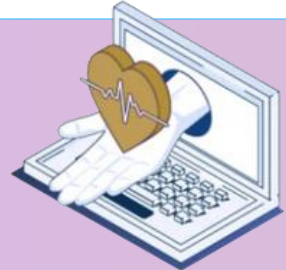
Fully integrated contact center solutions



Queuing & Skills-Based Routing



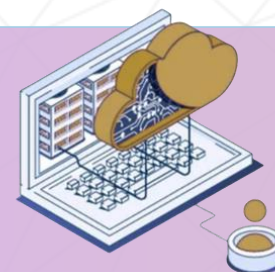
Voice & Screen Recording



Real-time Voice & Screen Monitoring



Courtesy Callback



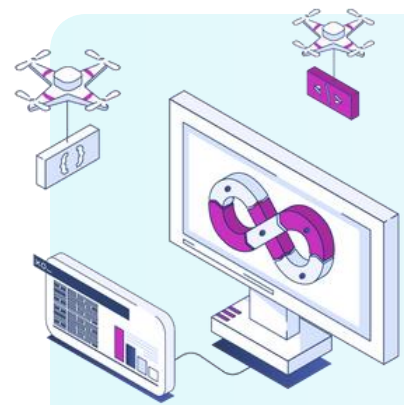
Supervisor Tools & Desktop

Also Offering:

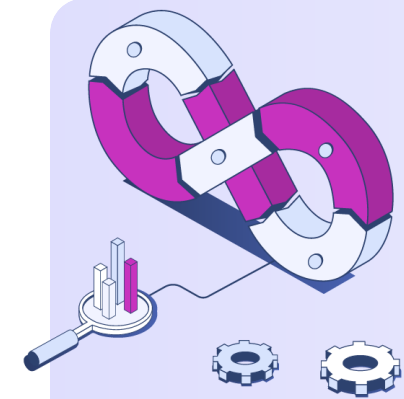
- Screen Pop for Core
- Notes to Core
- Integrated Scoreboard
- Voicemail in Queue
- Email in Queue
- Chat in Queue
- Work Force Management
- Full PBX

Directlink's Conversational AI

Communicating however customers prefer



Fully Modular



Custom Packages



Affordable For any FI

Conversational Virtual Agents



Virtual Banker



Virtual KYC

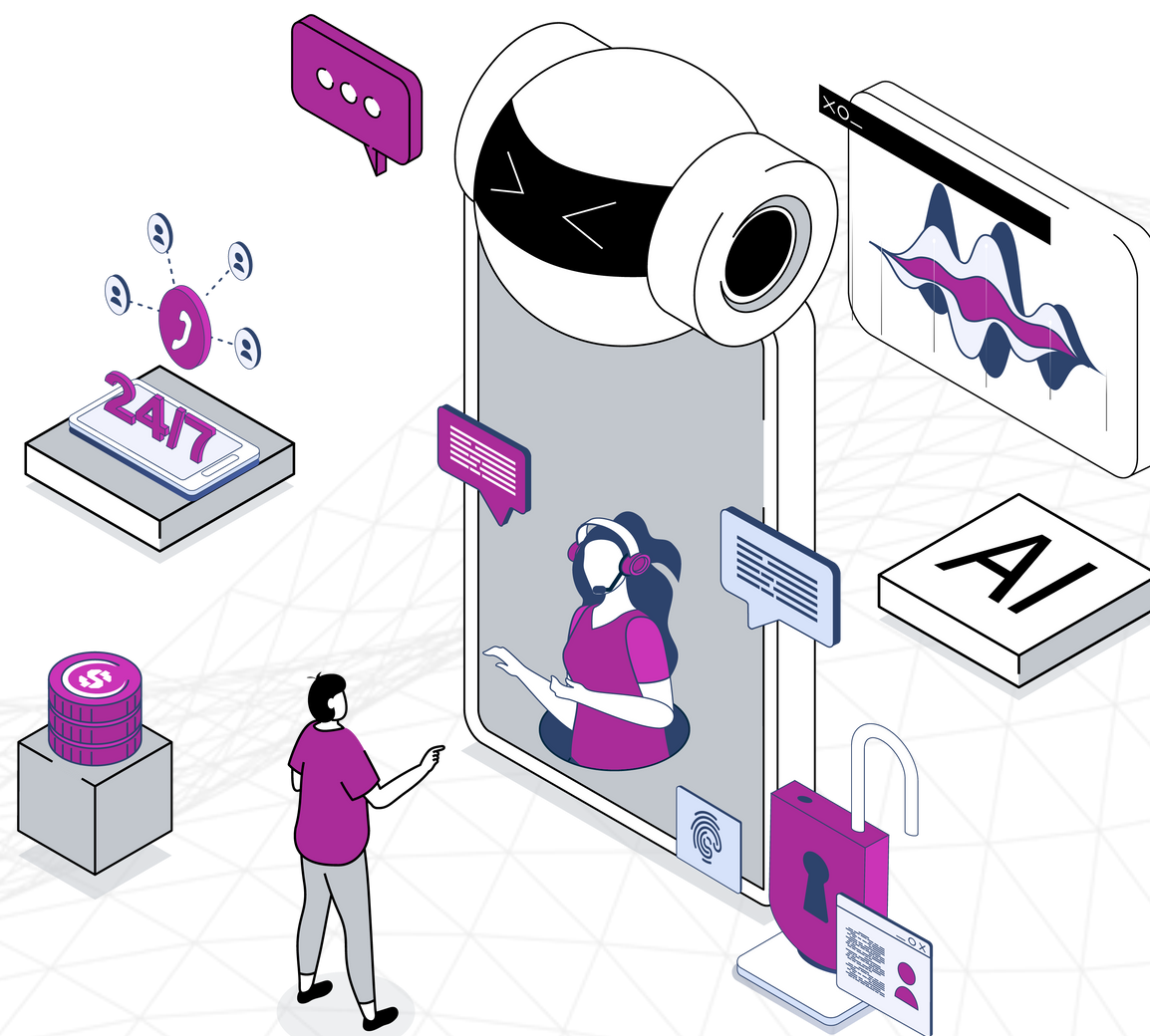


Virtual Operator



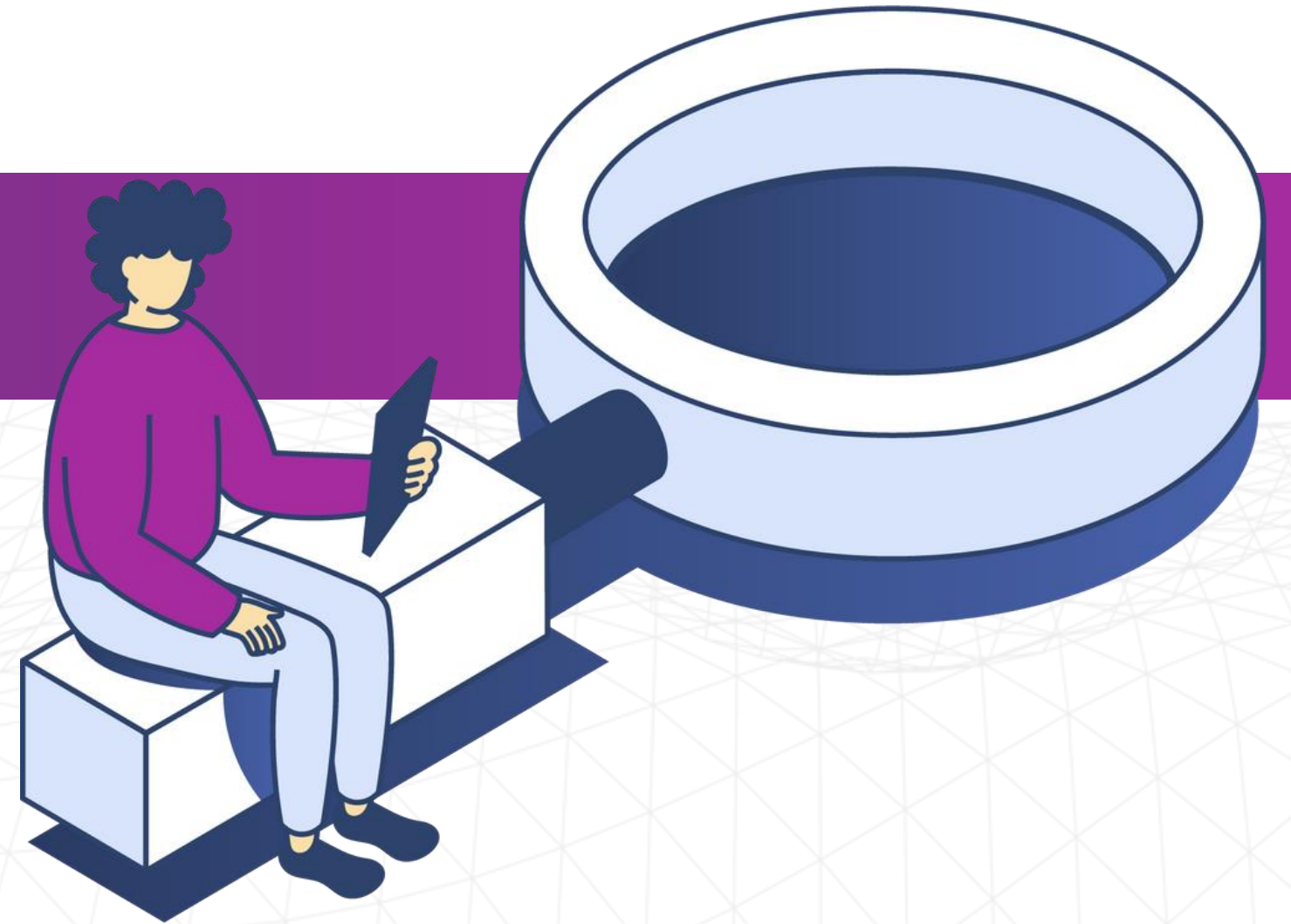
Virtual Voice

A Best-of-Breed CCaaS Platform for Financial Institutions





Q&A





Thank You!



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