

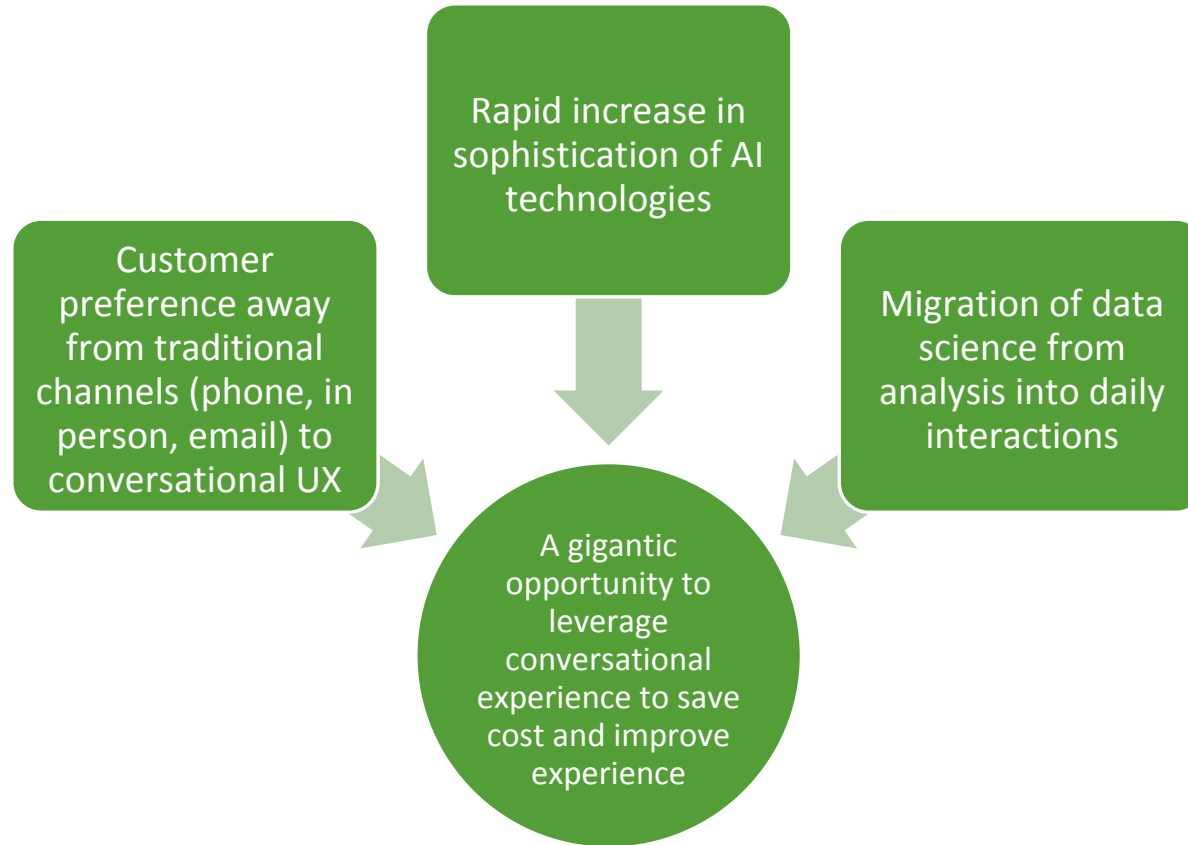
# *Actionable Science*

*Always Intelligent Never Artificial*

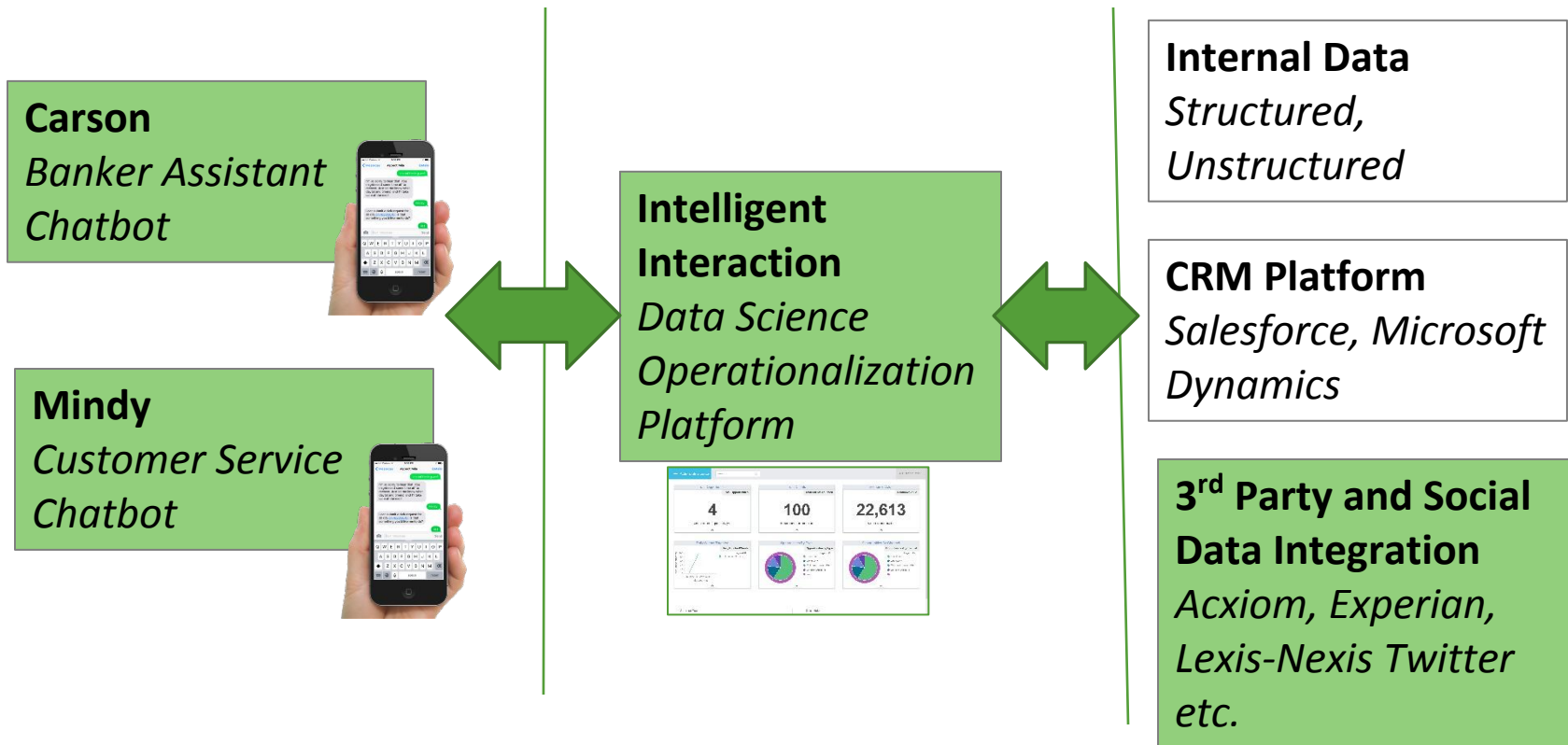
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# 3 key enabling trends are transforming how customers and employees will interact with the bank

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# An end to end platform to drive conversational user experience



# Carson – A Banker Assistant Chatbot that drivers efficiency and helps banker manage their relationship

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## Today:

Lookup **client and account** information

Create and **Manage CRM Opportunities**

Create and **manage referral**

Proactively **present account alerts, customer updates, leads and other interaction opportunities**

## In the pipeline:

Update KYC

Track Financial Plan

# Mindy – Customer Service Agent Extraordinaire

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## Today:

Lookup **balance and transactions**

Project and **manage cashflow**

**Transfer Money & Pay Bills**

Provide Product and **Rate Information**

## In the pipeline:

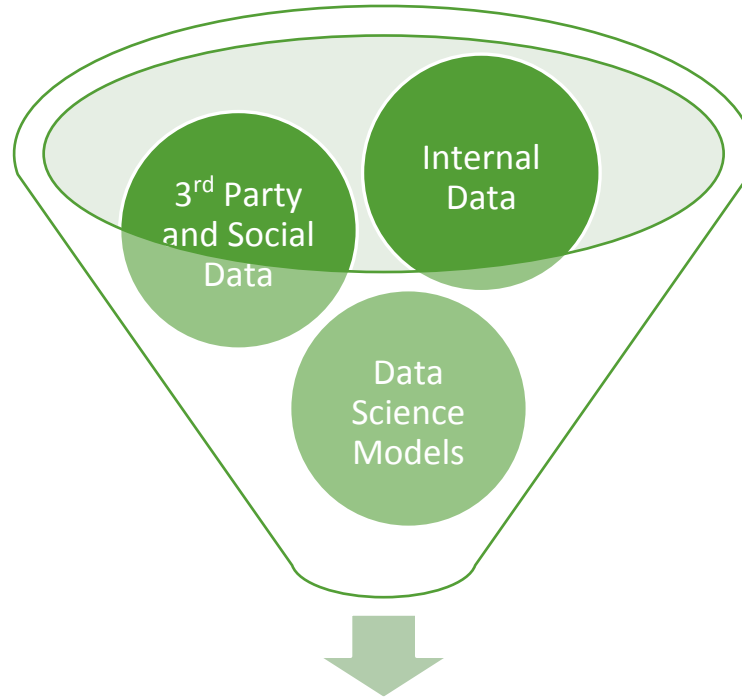
Track and assist with staying on goal based financial plan

Open Account

IOT Integration to help track finances

# Intelligent Interaction Platform

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Opportunities to cross sell, deepen,  
build advocacy

# Carson Demo

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# What we are looking for

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Financial Services Partners interested in Pilots/Proof of Concepts or Actual Implementations

Product Partners to integrate into the product – where the Bot provides a new way to interact with the product