



Leverage WhatsApp for Insurance & Banking

Conversational AI for Insurance: A Complete Guide

Learn how you can provide **exceptional Customer Experience** & Leverage WhatsApp for Finance & Insurance





Digital Bank



Any Home Loan offer with lowest interest ?

Hi Sejal,

Explore all details in the PDF attached and reach out to us for more information.



Home Loans Brochure



Home Loans.pdf

1 Page . PDF



Build a positive customer experience **with WhatsApp** for **Banking and Insurance** business



Acquire

Run click to WhatsApp ads to promote your BFSI products and services. Answer FAQs quickly via custom auto-replies and help customers with their queries



Convert

Carry out KYC processes like ID verification, document verification over an encrypted channel to expedite the loan applications. Upsell & Cross-Sell by sending personalized BFSI products recommendations based on purchase history & credit score



Delight

Solve queries & support customers at scale on WhatsApp. Gather ratings/feedback from clients using WhatsApp automated flows



Engage

Proactively notify target audience of new offers, loyalty points and more. Send informative and educational content relevant to their needs

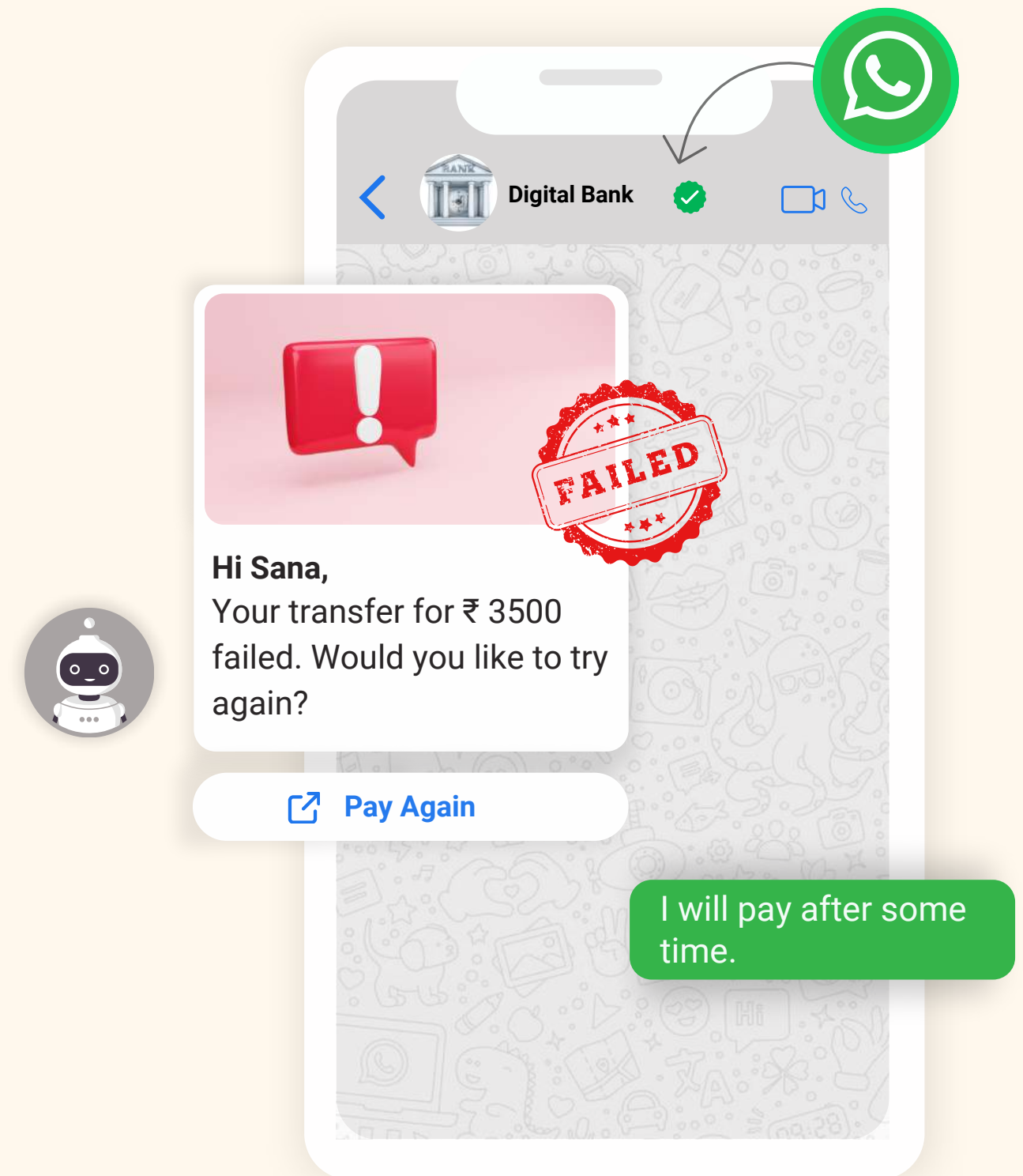
WhatsApp Business API Use Cases for **Banking Industry**

➤ **Account Alerts and Notifications:**

These notifications can include transaction alerts, balance updates, payment due reminders, and security alerts.

➤ **Customer Support (Cost Savings – lower spend on contact centers) :**

Using instant messaging with rich media and chatbot automation eliminates the need for lengthy calls to your contact center – and frequently asked questions taking up your agents' time. A WhatsApp chatbot built on our chatbot building platform Answers makes it easy for customers to resolve queries on their own – resulting in less wasted time, resources, and money.



➤ Account Statements and Transaction History:

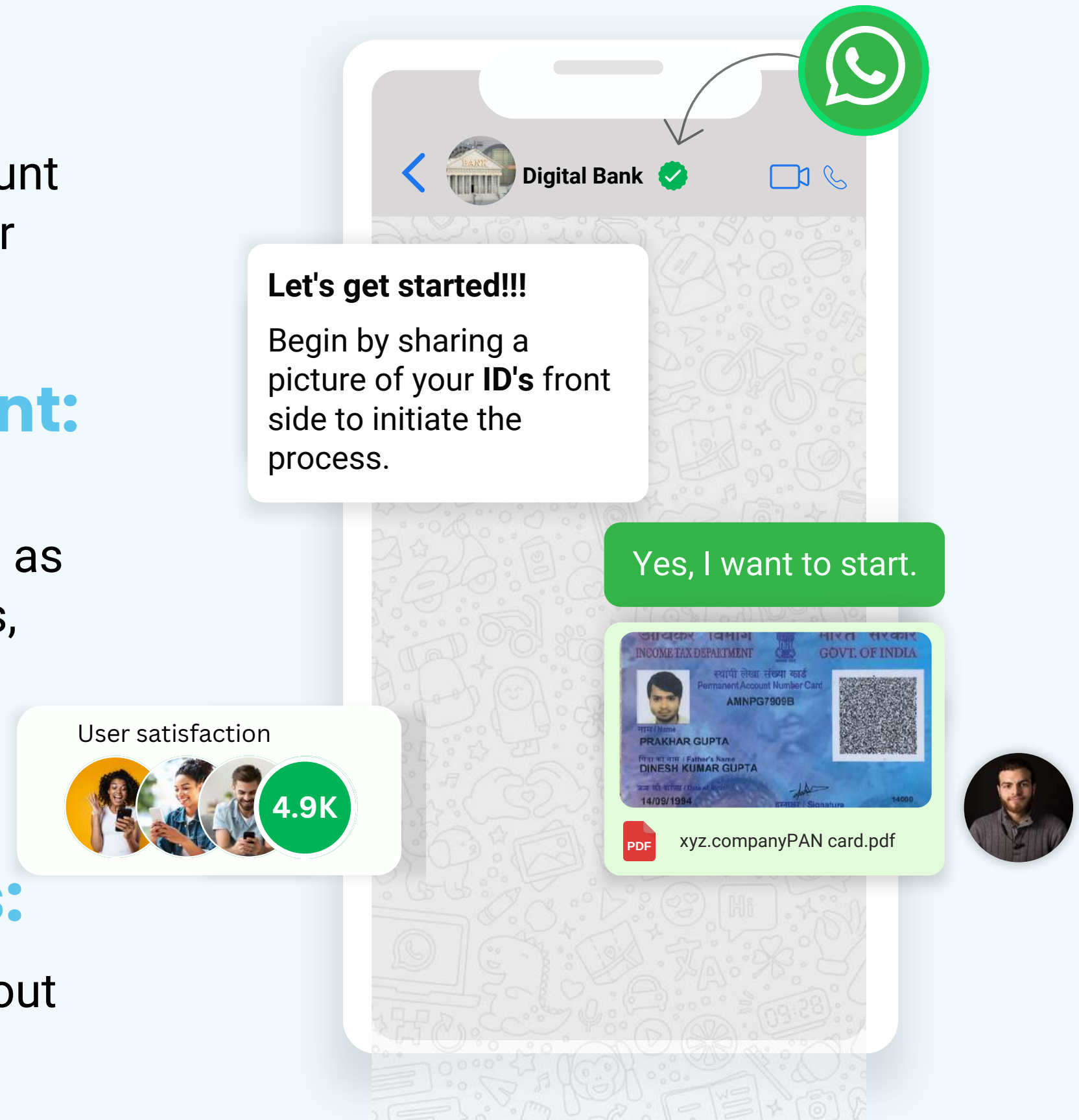
Banks can use WhatsApp to deliver monthly account statements and transaction history directly to their customers.

➤ Customer's Account Management:

WhatsApp Business API can enable customers to perform certain account management tasks, such as checking their account balance, transferring funds, or even blocking lost or stolen cards through a chatbot or automated system integrated with the bank's backend systems.

➤ Product and Service Promotions:

Banks can use WhatsApp to inform customers about new products, services, and promotions. This can include offers for loans, credit cards, savings accounts, and other financial products.



WhatsApp Insurance- Build an end-to-end customer journey

Learn how businesses in the Banking sector are exploring WhatsApp conversational commerce to create personalized and streamlined customer journeys.

#1 Choice of Startups and Brands



harmanhouse



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Get In Touch With Us!

We'd love to know your Whatsapp Use-Case and help your Business Grow using Whatsapp!



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