BANKBOT
BANKING CHABOT

Application made using Dialog flow:
By Bipul Senapati

How to Start Working Independent using Chatbot

Reduce and Eliminate initial stage headache for opening bank account.

Connect to Bank Bot Understand the system in a minute.

Set Savings & Investment Goals and Create a Plan with us.

Introduction: The Role of Technology in Banking

Financial institutions are expected to engage with their customers and members in a strategic and tactful manner, precisely at the opportune place and time. The seamless integration of chatbots in their engagement process can confer a myriad of advantages to customers, including rapid and customized interactions, thanks to the application of cutting-edge machine learning and artificial intelligence technologies.

The primary objective of this project is to create a Dialogflow-based chatbot that can emulate natural conversations related to opening a bank account. The chatbot is designed to guide the customer towards the most pertinent and informative content, thereby augmenting the likelihood of account opening.

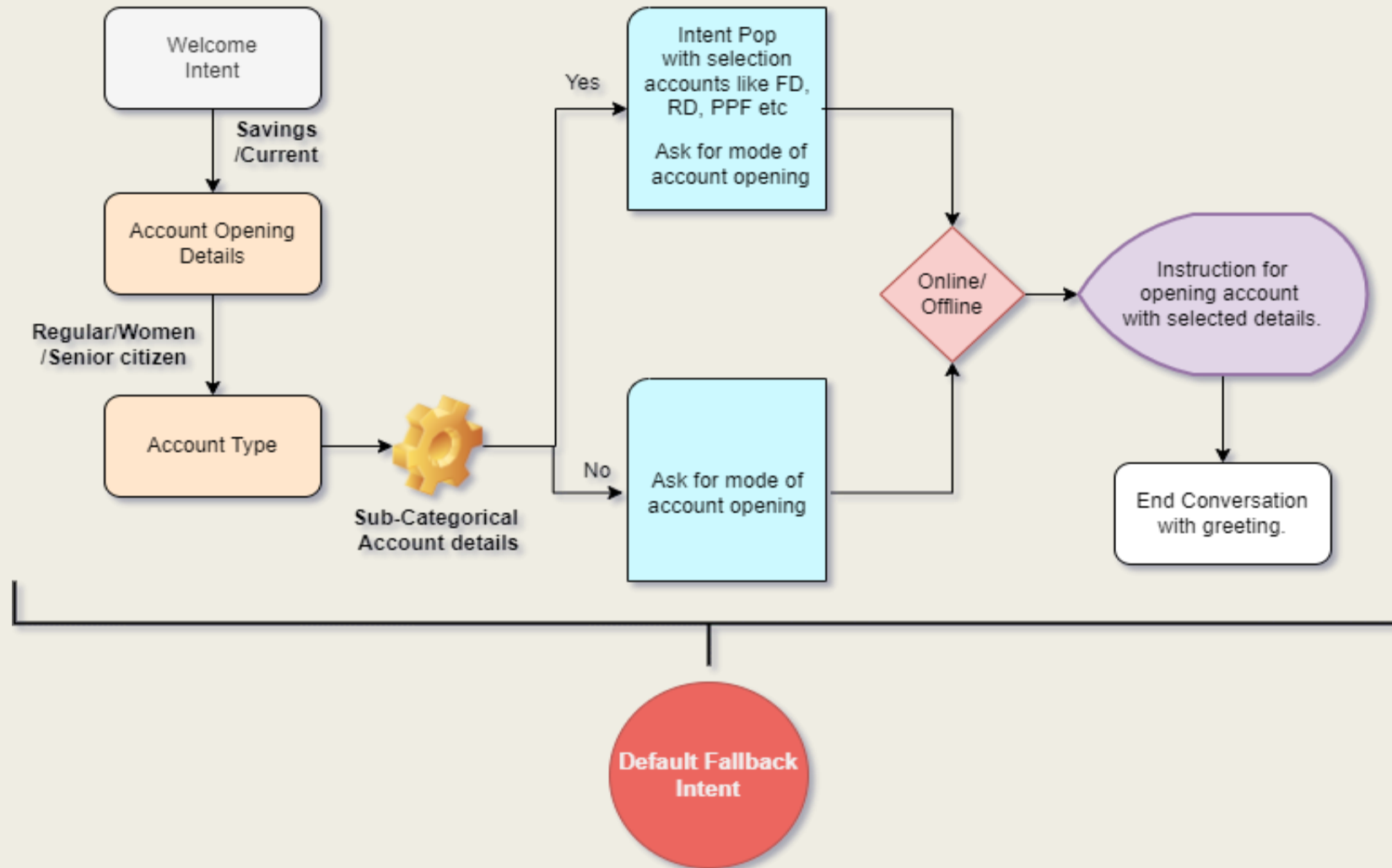# Benefits of Using a Chatbot for Customer Engagement

- **24/7 Availability:** Chatbots can be programmed to operate round the clock, providing customers with assistance anytime, anywhere.
- **Cost-Effective:** Implementing chatbots in customer engagement processes can be cost-effective, especially when compared to hiring additional staff to handle customer queries and support.
- **Quick Response Times:** Chatbots can provide quick and accurate responses to customers, improving the overall experience and reducing wait times.
- **Personalization:** With the help of AI and machine learning, chatbots can provide personalized responses to customers, tailoring the interaction to meet the specific needs of each customer.
- **Scalability:** Chatbots can handle multiple customer queries simultaneously, which makes them a scalable option for businesses that are growing and expanding.
- **Improved Customer Engagement:** Chatbots can improve customer engagement by providing a convenient and hassle-free way for customers to communicate with a business.
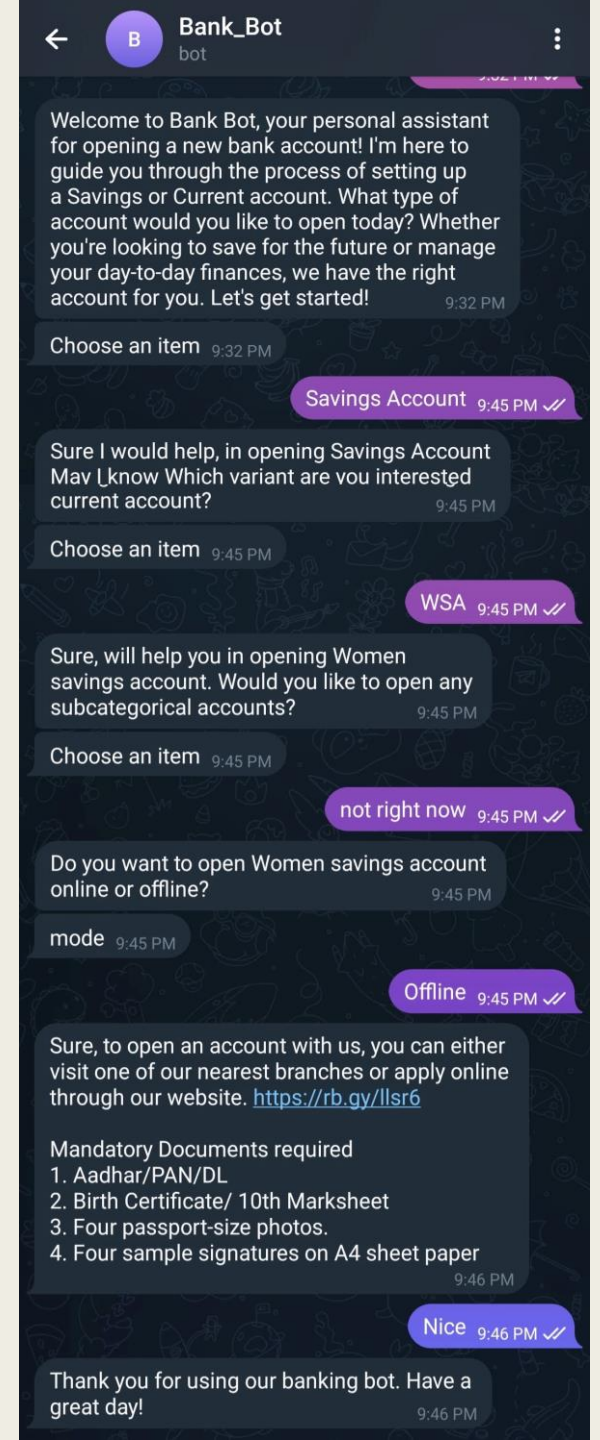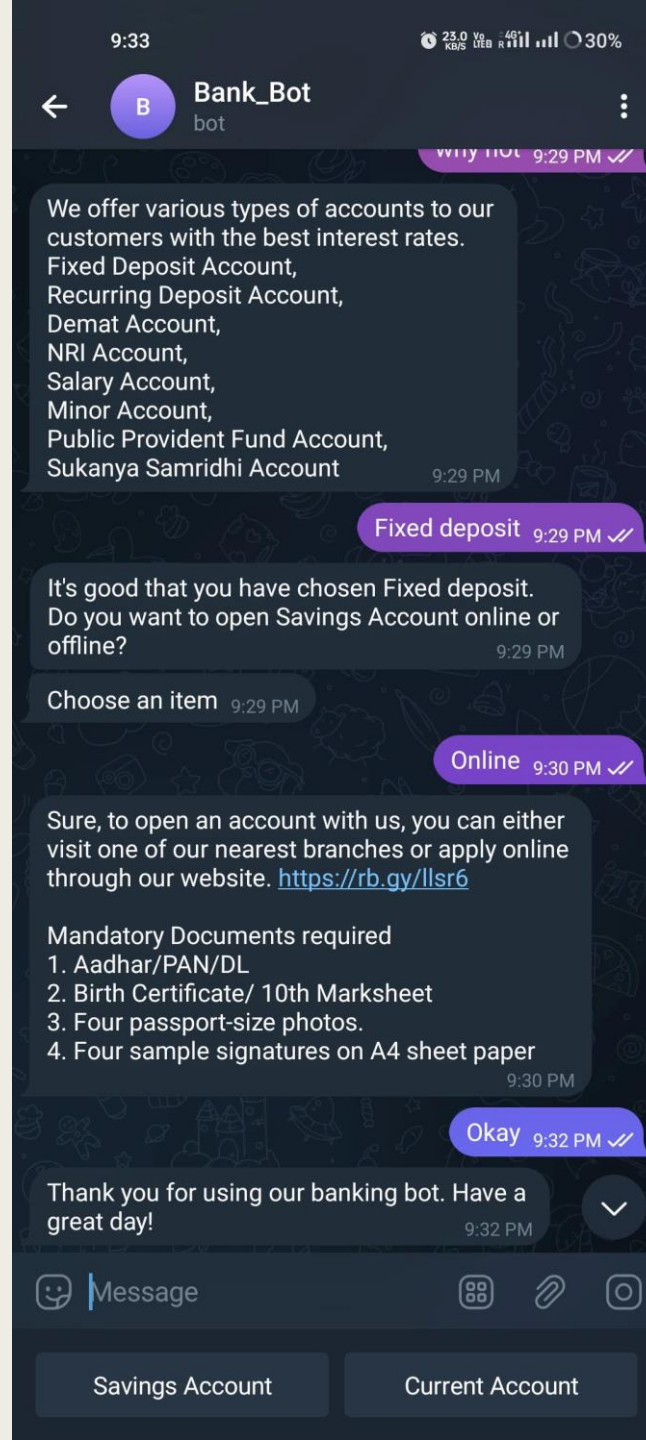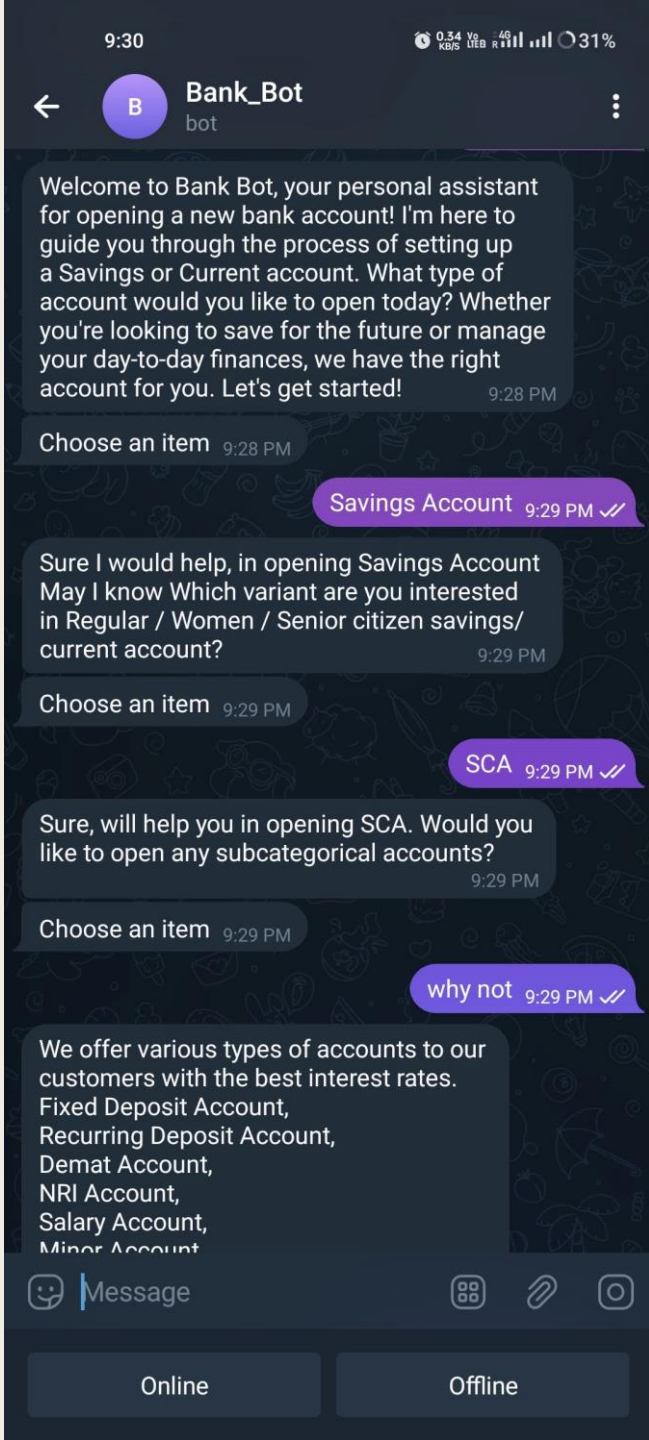
Overall, chatbots can enhance customer satisfaction, reduce response times, and optimize costs for businesses, making them a valuable asset for customer engagement.

Demo: Chatbot Account Opening Process

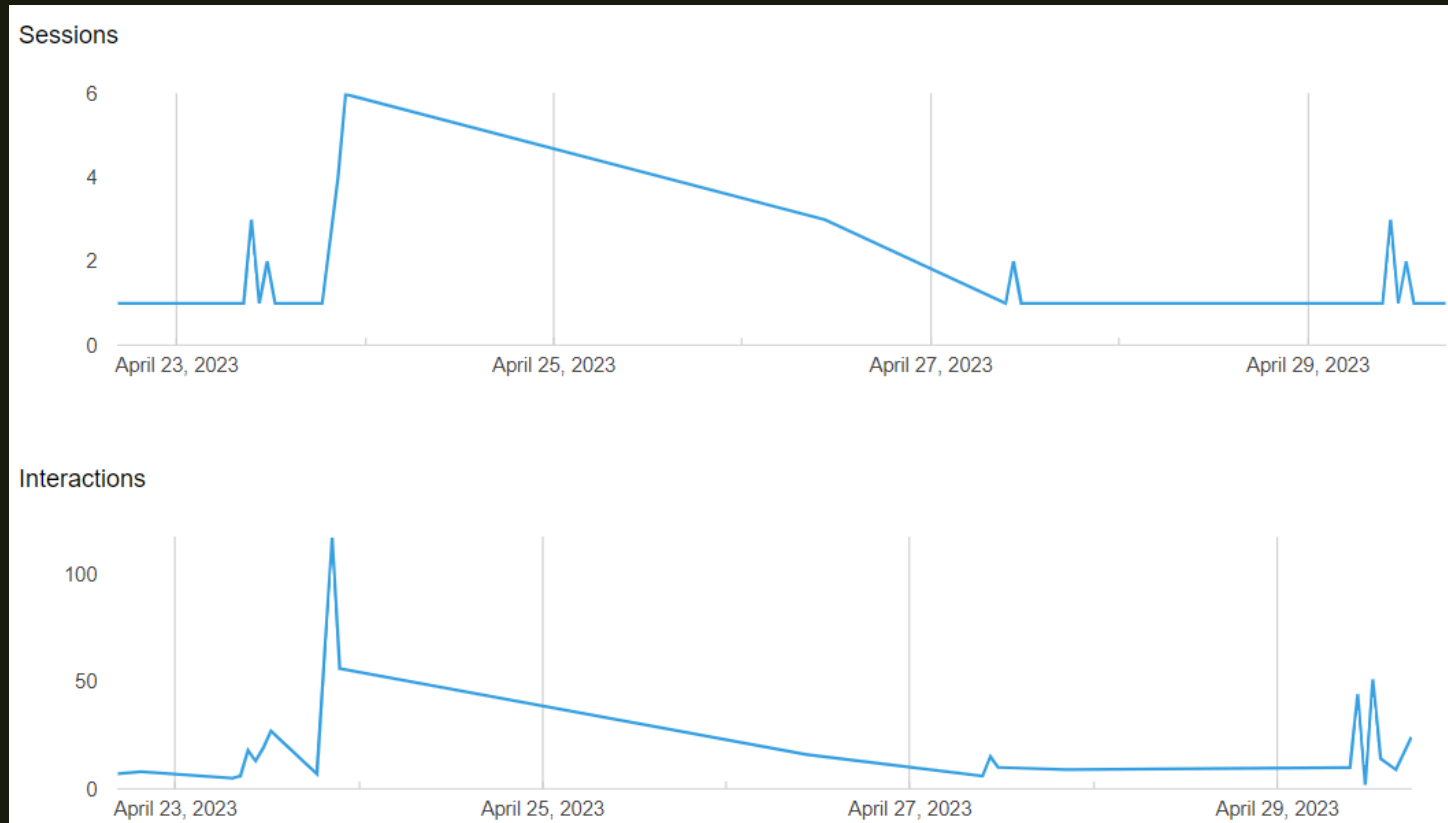
Intent Flow Diagram
- Bipul Senapati

Screenshot 1:

9:30 0.34 Yo R 4G 31%

← B **Bank_Bot**
bot

Welcome to Bank Bot, your personal assistant for opening a new bank account! I'm here to guide you through the process of setting up a Savings or Current account. What type of account would you like to open today? Whether you're looking to save for the future or manage your day-to-day finances, we have the right account for you. Let's get started! 9:28 PM

Choose an item 9:28 PM

Savings Account 9:29 PM ✓✓

Sure I would help, in opening Savings Account May I know Which variant are you interested in Regular / Women / Senior citizen savings/ current account? 9:29 PM

Choose an item 9:29 PM

SCA 9:29 PM ✓✓

Sure, will help you in opening SCA. Would you like to open any subcategorical accounts? 9:29 PM

Choose an item 9:29 PM

why not 9:29 PM ✓✓

We offer various types of accounts to our customers with the best interest rates.
Fixed Deposit Account,
Recurring Deposit Account,
Demat Account,
NRI Account,
Salary Account,
Minor Account

Message

Online | Offline

Screenshot 2:

9:33 23.0 Yo R 4G 30%

← B **Bank_Bot**
bot

why not 9:29 PM ✓✓

We offer various types of accounts to our customers with the best interest rates.
Fixed Deposit Account,
Recurring Deposit Account,
Demat Account,
NRI Account,
Salary Account,
Minor Account,
Public Provident Fund Account,
Sukanya Samridhi Account 9:29 PM

Fixed deposit 9:29 PM ✓✓

It's good that you have chosen Fixed deposit. Do you want to open Savings Account online or offline? 9:29 PM

Choose an item 9:29 PM

Online 9:30 PM ✓✓

Sure, to open an account with us, you can either visit one of our nearest branches or apply online through our website. https://rb.gy/llsr6

Mandatory Documents required
1. Aadhar/PAN/DL
2. Birth Certificate/ 10th Marksheet
3. Four passport-size photos.
4. Four sample signatures on A4 sheet paper 9:30 PM

Okay 9:32 PM ✓✓

Thank you for using our banking bot. Have a great day! 9:32 PM

Message

Savings Account | Current Account

Screenshot 3:

← B **Bank_Bot**
bot

Welcome to Bank Bot, your personal assistant for opening a new bank account! I'm here to guide you through the process of setting up a Savings or Current account. What type of account would you like to open today? Whether you're looking to save for the future or manage your day-to-day finances, we have the right account for you. Let's get started! 9:32 PM

Choose an item 9:32 PM

Savings Account 9:45 PM ✓✓

Sure I would help, in opening Savings Account May I know Which variant are you interested current account? 9:45 PM

Choose an item 9:45 PM

WSA 9:45 PM ✓✓

Sure, will help you in opening Women savings account. Would you like to open any subcategorical accounts? 9:45 PM

Choose an item 9:45 PM

not right now 9:45 PM ✓✓

Do you want to open Women savings account online or offline? 9:45 PM

mode 9:45 PM

Offline 9:45 PM ✓✓

Sure, to open an account with us, you can either visit one of our nearest branches or apply online through our website. https://rb.gy/llsr6

Mandatory Documents required
1. Aadhar/PAN/DL
2. Birth Certificate/ 10th Marksheet
3. Four passport-size photos.
4. Four sample signatures on A4 sheet paper 9:46 PM

Nice 9:46 PM ✓✓

Thank you for using our banking bot. Have a great day! 9:46 PM

DEPLOYED BANK BOT

o **DialogFlow WebURL:**
  o https://bot.dialogflow.com/6bf2331b-3395-48e1-9c8e-1a16e3541ad0

o **Telegram bot link:**
  o t.me/OpenBankerbot.

Challenges and Considerations When Building a Chatbot for Banking

- Designing Effective Conversational Interfaces

- Integration with Other Channels and Systems

- Continuous Improvement and Iteration

- Future Developments and Opportunities for Chatbots in Banking

Google Dialog flow Analytics

Make a Plan to open account with us seamlessly

1 → **2** → **3**

Search branch near by your location with google.

Call us to book appointment with our dedicated **Relationship Manager.**

Grab attractive **offers** with joining Kit.

THANK YOU

senapatibipul@gmail.com ||8895331388