

IBM Technology Brand Messaging

IBM Sales Plays

The seven IBM Sales Plays are anchored around our client's most pressing business needs and align with IBM's mission on Hybrid Cloud and Artificial Intelligence growth strategy.

- [Generative AI](#)
- [IBM Sustainability](#)
- [Data Fabric](#)
- [AIOps](#)
- [Business Automation](#)
- [Customer Care](#)
- [Zero Trust](#)
- [Data Resilience](#)
- [Red Hat OpenShift](#)

IBM Technology Patterns

Technology Patterns are sets of prescriptive use cases, assets, and an IBM point-of-view that we proactively offer to our clients to rapidly prove the value of the pattern in the clients’ contexts.

- [Hybrid Cloud Storage](#)
- [Customer Care](#)
- [Process Mining](#)
- [Intelligent Asset Inspection](#)
- [Digital Labor](#)
- [Foundation Models](#)
- [AI Governance](#)
- [Modernizing Business Critical Applications](#)
- [Open Hybrid Cloud Platform](#)
- [AI Assisted IT Automation](#)
- [Optimizing Public Cloud with Elasticity](#)
- [Data Security](#)
- [API-Led Integration](#)
- [Hybrid Data Governance](#)

“Scenario” Template

EXAMPLE: Direct Customer Assistance

WHY?

Banks and Insurance companies are prioritizing quality customer experience over call deflection in defining new automation opportunities

Complex questions answered quickly with human touch build trust

Customers want to trust their service providers and partner with them, and if successful they will increase investment

Use Case Scenario Description

- Customer has questions about the terms and conditions of their loan, based on some change of financial/personal circumstances. Agent uses Generative AI - Summarization to digest and process one or more long documents to find answers

Pain Points and Metrics of Concern

- Default on credit card and loan payments is rising
- Loan documents are complex and not easy to read for customer, agent
- Finding answers while client is on the line in complex documents is frustrating for all
- Low NPS
- Low customer referral rate

Key Benefits

- Speed up answer to question-creates perception of trust between customer, lender
- Customer Satisfaction
- Minimize wrong answers

Relevant IBM Products and Services

- watsonx.ai

Relevant INDUSTRY data sets and Applications

- Customer data, loan documents, product catalog, ...
- AI: *[best model suggestion?]*

Client Stories:

Foundation Model type	Model Usage
generative	response and Q&A
classification	customer segment
summarization	explanation of documents
extraction	
geospatial	
AI applications (e.g. Orchestrate Assist)	simple task automation

IBM Financial Services Industry Our Messaging

Why AI in Financial Services

Why Hybrid Cloud in Financial Services

How we Reimagine Experience

How we change Ways of Working

How we Transform Projects

Empower financial institutions to deliver a more tailored, efficient consumer experience and transform the working environment for employees into a realm of proactive insights and automated workflows.

Introduction....

Introduction....

Use Case: Trust and Governance

- Use Case Scenario: 1
- Use Case Scenario: 2
- Use Case Scenario: 3

Fit for Purpose

- Scenario 1
- Scenario 2
- Scenario 3

Use Case Scenario: 1

Use Case Scenario: 2

Use Case Scenario: 3

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Business Insights

- Scenario 1
- Scenario 2
- Scenario 3

Protection

- Scenario 1
- Scenario 2
- Scenario 3

Customer Care

- **Direct Customer Assistance**
- Scenario 2
- Scenario 3

What we use from IBM Technology & Services