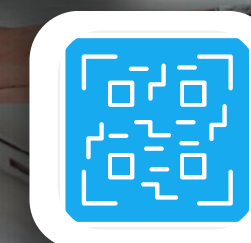




Simplify, Scale, and Serve Smarter with WhatsApp for BFSI Sector

Enabling Financial Services Sector to Do More—Engage, Connect & Automate. From Onboarding to Ongoing Support—Simplify Consultant Enablement via WhatsApp



Meet **Anantya**—

The Evolution of Intelligent Business Messaging

Our Journey So Far



Over **1 Billion Conversations**
Delivered across industries.



Global Footprint with a strong presence in the Middle East, Asia-Pacific, and Africa — and growing.



Trusted by Businesses ranging from agile **Startups to Enterprise Giants.**



ISO-Certified Infrastructure, ensuring secure, compliant, and enterprise-ready deployments.



Recognized Technology Partner to leading telecom providers and marketing automation platforms.



Built for **Conversations**, Trusted for **Results**

Anantya isn't just a tool, it **powers conversations** that are **smarter, faster, and built to scale**.

What began as a WhatsApp API integration has evolved into a **dynamic, industry-agnostic engagement platform**, trusted by businesses worldwide to **simplify communication, personalize journeys**, and scale effortlessly. **Built for speed**, designed for **flexibility**, and driven by AI — Anantya transforms every **interaction into growth**, no matter the industry or geography.

✓ Customizable workflows

✓ Official WhatsApp Business Blue Tick

✓ Seamless Integrations

✓ AI-powered engine



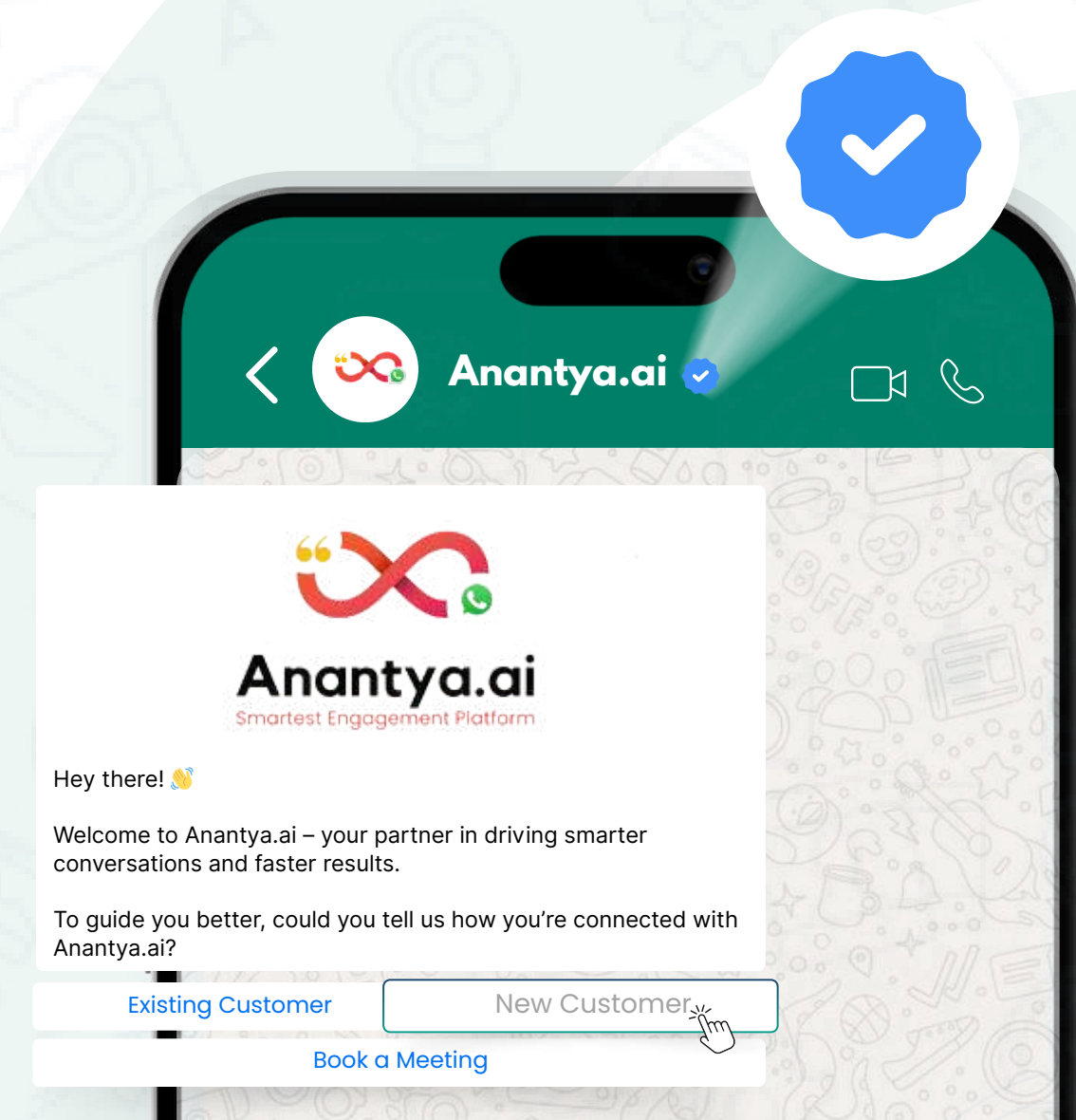
500+ CLIENTS ONBOARDED



3+ YEARS OF EXPERIENCE



20+ COUNTRIES SERVED



Hey there! 🌟
Welcome to Anantya.ai – your partner in dr...
New Customer
12:22 pm

BFSI Sector's Focus Areas:

Anantya.ai is **redefining how your customers connect**—with automated, personalised conversations that simplify onboarding, renewals, claims, and customer support.



**COLLECT KYC &
DOCUMENTS
VIA WHATSAPP**



**Pre-Qualify
Leads with
Smart Chatbots**



**AUTOMATE CLAIMS
INITIATION &
TRACKING**



**OFFER 24/7 MULTILINGUAL
CUSTOMER SUPPORT**



**DRIVE RENEWALS WITH
REMINDERS & PAYMENT LINKS**

Anantya.ai empowers fintech industry to **serve faster and smarter** by turning WhatsApp into a powerful **customer engagement assistant**. Our Business API **streamlines** onboarding, claims, renewals, and support—making **customer journey seamless and scalable**.



DID YOU **KNOW??**

Reimagine Financial Journeys—Powered by WhatsApp

98% of WhatsApp messages are opened, compared to just 20% for **email**

50% **reduction** in operational delays through smart automation on WhatsApp.

70% **of routine customer queries** can be handled instantly by a chatbot

90% of potential/existing customers **respond** within the first hour **on WhatsApp**



SEBI

Monday

Hello Rahul! 🙌

Welcome to **SEBI's official WhatsApp Assistant.**

We're here to help you make informed and secure financial decisions. 😊

Would you like to explore more?



okay



How can we assist you today?

Know Your Investor Rights



Learn About Market Risks & Safety Tips



Report a Complaint or Suspicious Activity



Just choose an option of your choice!

Challenges Faced in BFSI Customer Engagement



**Reaching the Right
Customers**



**Delays in documentation
and verification**



**Low Engagement During
Customer Lifecycle**



**Support teams are bogged
down by repetitive FAQs**



**Policyholders often ignore
emails or miss calls**



**Limited Automation
Across Journeys**



Key Features Tailored for BFSI Sector

Instant Lead Engagement from Ads

Feature: **Click-to-WhatsApp Ads (CTWA)**

- Turn social insurance ads into real-time WhatsApp conversations. Capture interest instantly & convert leads faster.

Always-On Communication, Any Channel

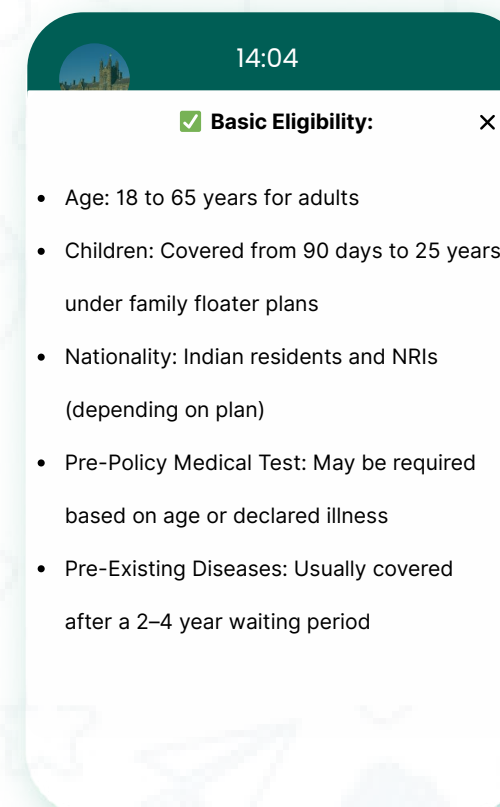
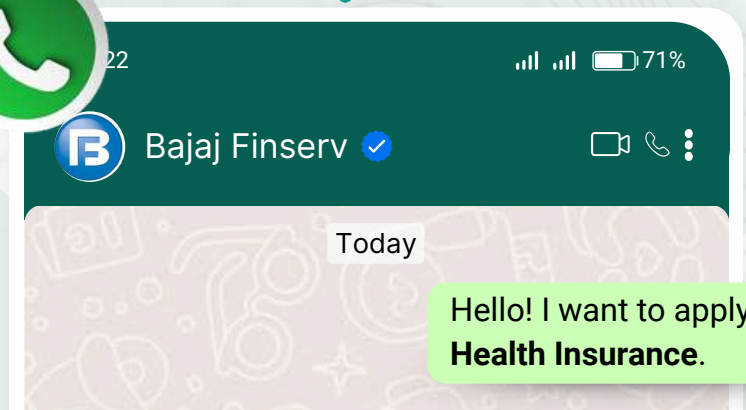
Feature: **Omnichannel** (Website, SMS, Live Chat, WhatsApp)

- Let **interested customer choose their channel** — chatbot continues the journey across platforms.

Frictionless Appointment Booking & Policy Exploration

Feature: **Interactive Templates & Smart Flows**

- Allow potential customers to **choose appointment slots**, submit documents, or explore policies via buttons.
- Use **rich templates** to reduce form drop-offs.



Welcome to Bajaj Finserv!
I'm Ram!
How may I assist you today?

Please **choose an option to get started**

11:25 AM

[View Plan Eligibility](#)

[View Plan Benefits](#)

[Talk to Agent](#)

[View Plan Eligibility](#)

Automated Lead Qualification & Customer Assistance

Feature: Chatbots & Automations

- **Automate** document collection, eligibility checks, and FAQs.
- **Qualify leads** instantly and escalate only when needed.

Policy & Renewal Alerts That Actually Get Seen

Feature: Broadcast + SMS Fallback

- Send **bulk updates**, policy changes, or spread awareness to thousands — backed by SMS fallback for 100% delivery.
- Add **personalization** for higher response rates.

Collect Premiums & Payments Instantly

Feature: Integrated Payment Links on WhatsApp

- **Use UPI/payments** within WhatsApp for premium payments, top-ups, or service fees with **zero redirects**.

Customer Journey & Status Tracking Made Simple

Feature: LMS & Smart Labels

- Automatically **tag applicants** as Applied, Verified, Document collected, etc.
- **Organise** customers by Region, Policy Type, or Interaction Stage.

Different Payment Methods to Choose from

×

Confirm Payment

Send to Fun & Food Park

Razorpay

UPI

NET BANKING

DEBIT/CREDIT CARD

TOTAL

Rs. 4500.00

Select and Continue



Hi Raj,
Welcome to Bajaj Finserv! 🤖
To move ahead with your policy process, please complete and submit the required documents.

12:22 pm

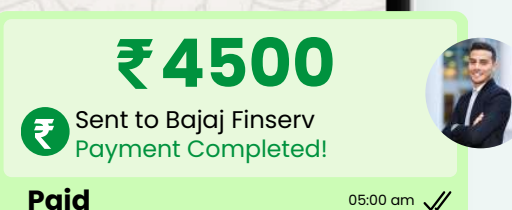
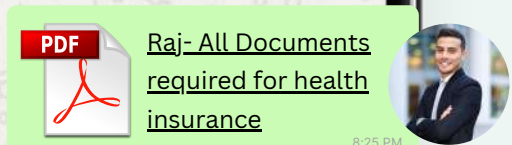
[Click to view the checklist](#)



Congratulations! Your submitted documents are verified.
Please click on the link below pay the application fee—

8:26 PM

[Pay Platform Fee](#)



Payment received **successfully!**

8:26 PM

Your application is under review!
May I help you with anything else?


[Options:](#)

9:00 AM

Track Application
Check Status
Download Application
Talk to an Agent



Smarter Engagement Starts on WhatsApp

 Check out from our list of services and special discounts 10:33 am



Whether it's for home, travel, business, or emergencies, get quick approvals, flexible EMLs, and trusted support—all in one seamless experience.

[Apply Now](#)
[Explore Our Plans](#)



A complete insurance plan gives you more than just coverage — it offers protection, savings, tax benefits, and future security, all in one smart solution.

[Get Started Now](#)
[Explore Our Plans](#)



Grow your wealth. Save on taxes. Reach your goals—faster. Discover investment options that work around your life, not the other way around.

[Start Investing](#)
[Explore Our Plans](#)

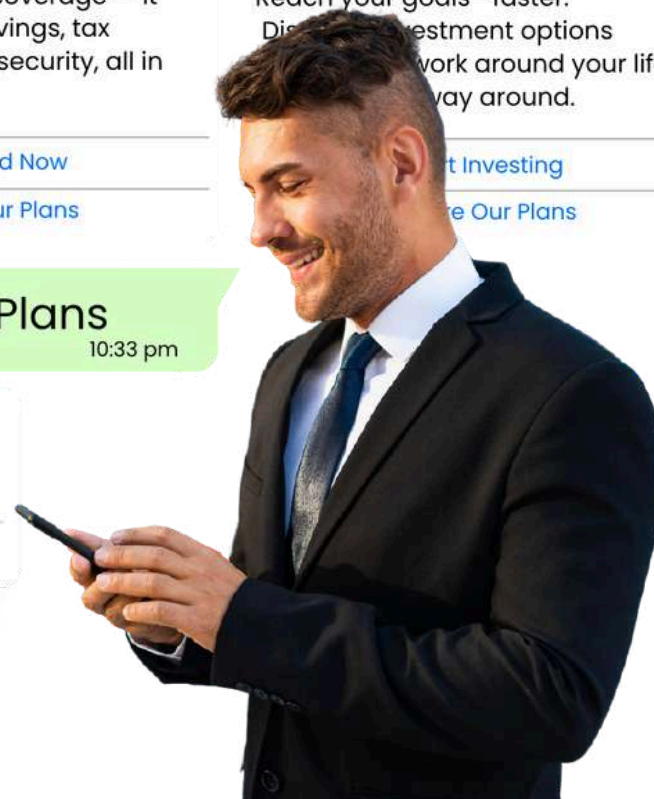
Explore Our Plans

10:33 pm

Click on the link below to explore our Plans

10:34 pm

[Explore all Plans](#)



Bonus: Integration Possibilities

Works effortlessly with core banking systems, loan management software, CRMs, and policy servicing platforms like Finacle, Salesforce, LeadSquared, and more.

Instant Customer Engagement

Automated responses for policy enquiries, document acknowledgements, claim updates, and FAQs on WhatsApp.

Seamless Appointment Coordination

Auto-schedule medical checks, send premium reminders, and reschedule appointments or callbacks—all via WhatsApp.

Customer Onboarding & Support

Share policy documents, explainer videos, and compliance details instantly on WhatsApp, making onboarding paperless.

Document Collection & Verification

Securely collect KYC documents, medical reports, claim proofs, and policy acknowledgments—directly on WhatsApp.



Bajaj Finserv

71%

Deliver Personalized Notifications

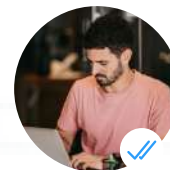


<https://www.bajajfinserv.com>
<https://www.bajajfinserv.com>

Hii Sameer,
 Secure Your Financial Future with
 Smart Guidance and Personalized
 Plans.

Ignite Your Insurance Journey
 Today!

[Check the Limited Time Plan](#)



Agent Response Time

50 Sec

Sent to

855+ Customers

Delivered

85%

Not Delivered

15%



Your message will be
 delivered here...

Hii sameer,
 Secure Your Financial Future with Smart
 Guidance and Pe.....

Ignite Your Insurance Journey Today!
[Click here](#)

12:06 am

SMS fallback

Benefits of WhatsApp Support for BFSI Sector

- **24/7 Smart Support**– Answer FAQs, track claims, send policy status —all with AI-powered instant replies, anytime, anywhere.
- **Higher Response Rates:** 98% open rates and real-time replies make WhatsApp the most effective channel to reach and retain.
- **24/7 Availability:** AI-powered chatbots ensure round-the-clock support and assistance.
- **Simplified Claims & Renewals:** Automate reminders, collect documents, and guide users step-by-step—all in a single, intuitive conversation.
- **Personalized, Multilingual Experience:** Engage customers in their preferred language with contextual responses tailored to them.
- **Secure & Verified Communication:** End-to-end encryption via WhatsApp Business API ensures all interactions are secure.

Smart Replies for Every Insurance Query

12:22 71%

Bajaj Finserv

Today

Welcome to Bajaj Finserv's WhatsApp Support!
We're here to make your experience seamless and stress-free.
Please select your preferred language:

Hindi English

English

BAJAJ FINSERV

Welcome Suraj!

From real-time policy updates to guided onboarding, document submissions, claim tracking, and more—we've got it all at your fingertips! How may I assist you today?

List

Please choose an option to get started:

- Explore Insurance Plans
- Share Your Details /Get a Quote
- Schedule a Callback
- Track Policy / Claim Status
- Submit Documents
- Talk to a Support Executive

Personalise communication

List services to choose from

Seamless Support, Instant Answers

Smart shortlisting, no manual screening

12:22 71%

Bajaj Finserv

Today

Explore Insurance Plans

Great! Let's help you find the right plan. 😊
Please select the type of insurance you're interested in:

Life Insurance
Health Insurance
Savings & Investment Plans

Savings & Investment Plans

Awesome! 🎉
Our Savings & Investment Plans are designed to help you grow, protect, and plan your finances better.

What would you like to do today?

View Popular Plans
Get a Personalized Suggestion
Talk to an Advisor

Get a Personalized Suggestion

Great! 💰
To recommend the best Savings & Investment Plan for you, I just need a few quick details.

Please fill in your details

Full Name: Sameer Jain
Age: 35 Yrs.
Contact Number: +91 9898675654
Monthly/Yearly Investment Budget: Monthly Rs. 15,000 Budget
Primary Goal: Retirement Planning

Smart Lead Capture

Smart Loan Support, One Chat Away

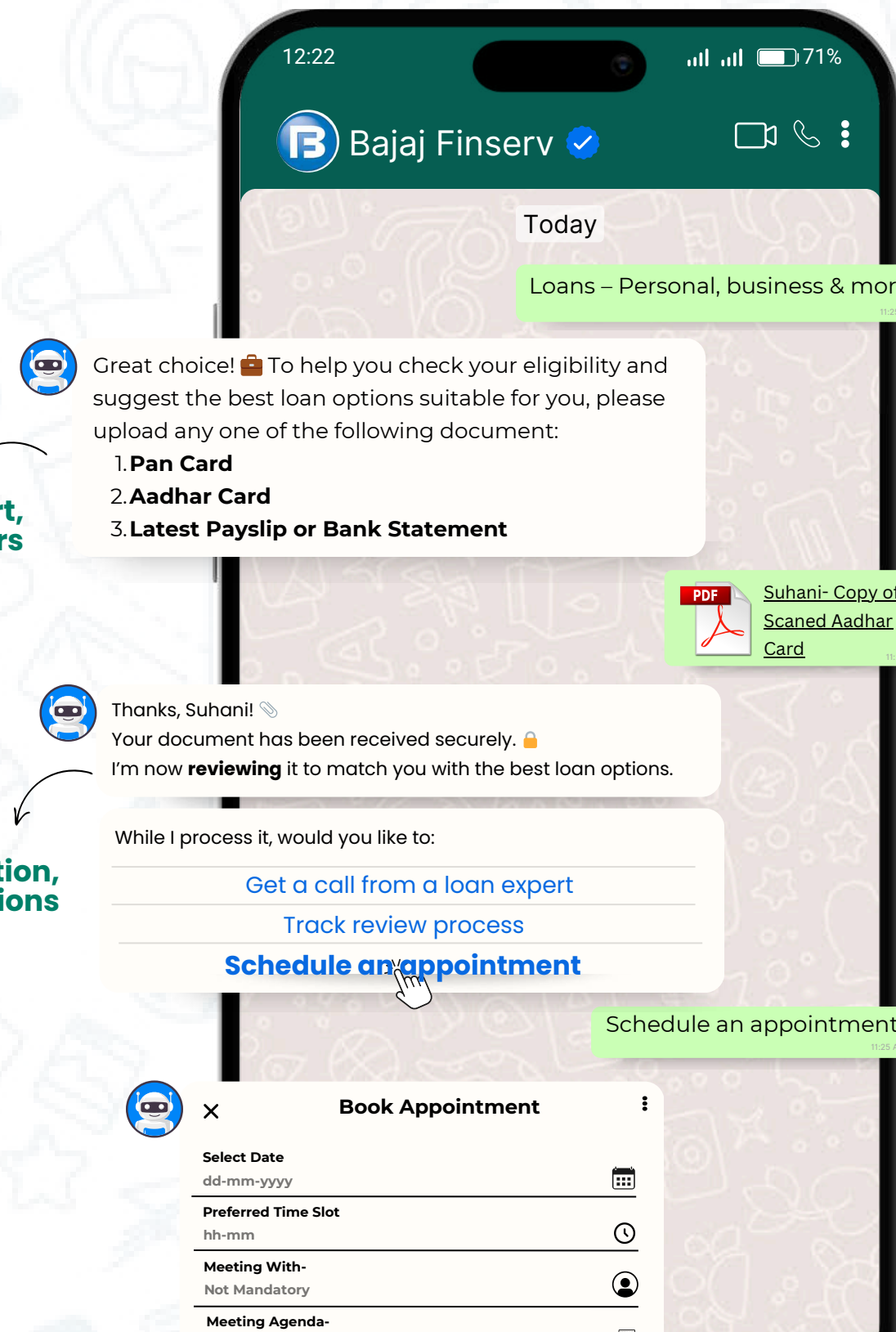
Automated Campaigns



List all your services

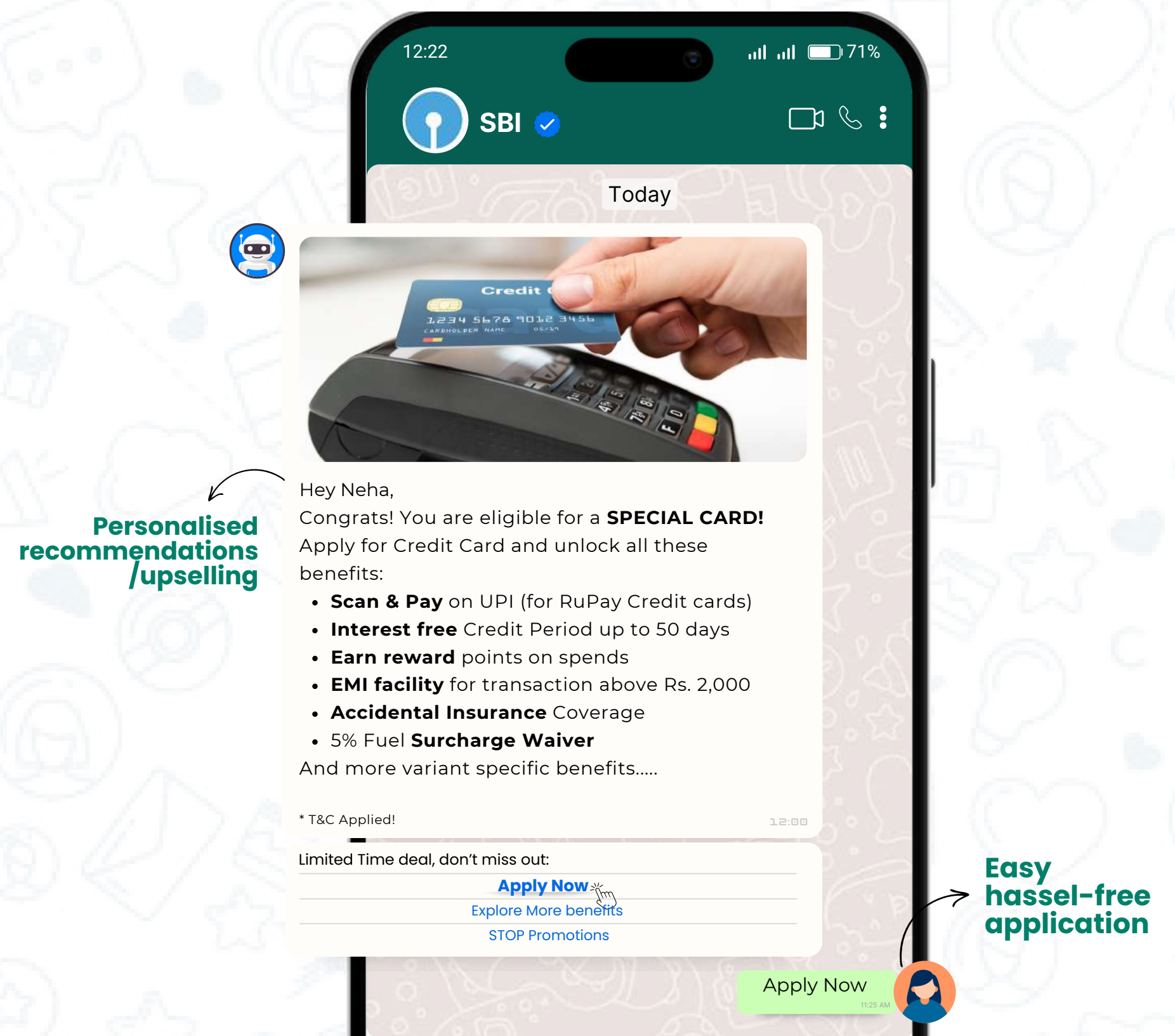
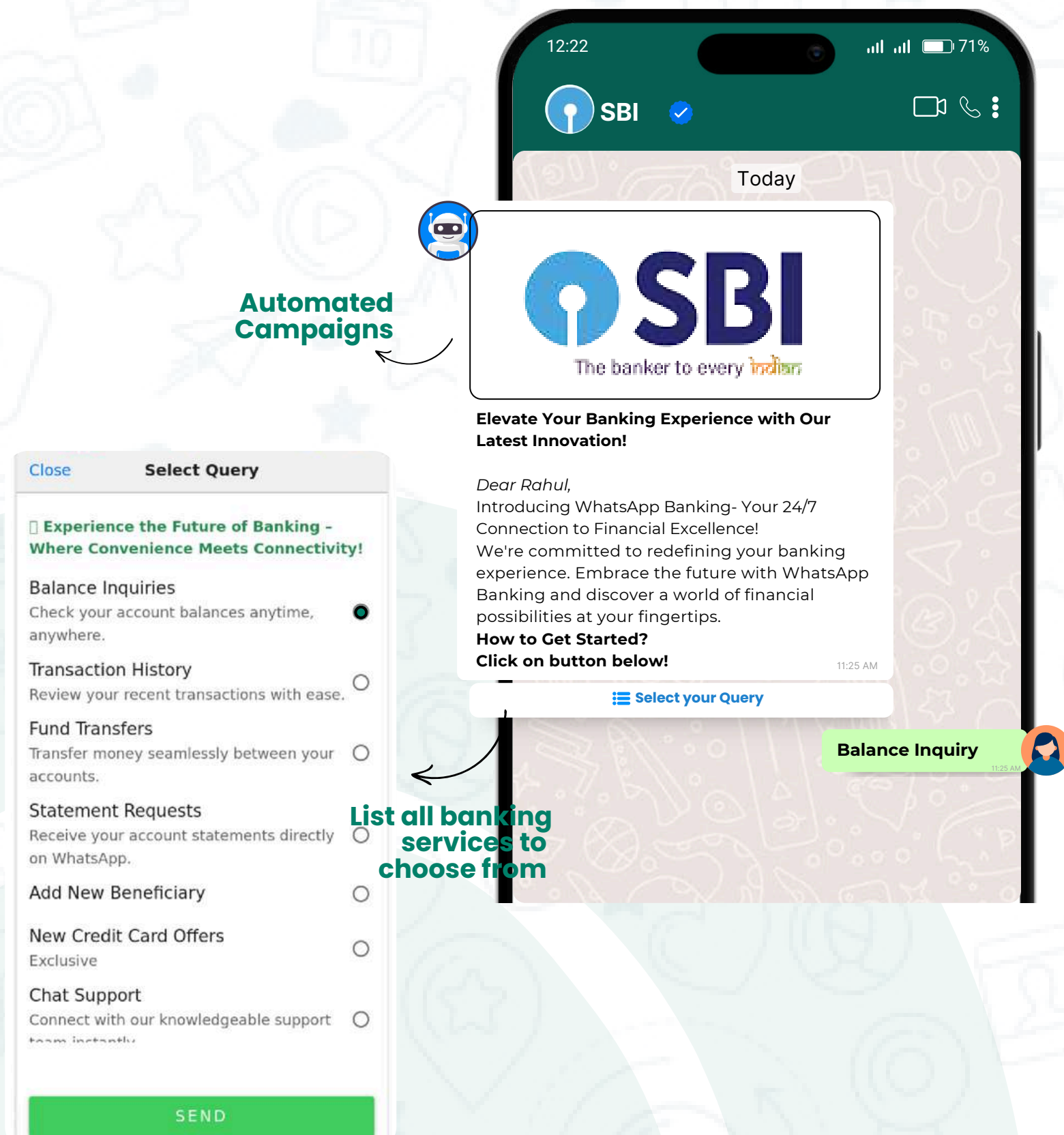
Seamless Support, Instant Answers

Smart automation, with integrations



Easily apply/track request

Your Daily Banking, Now on Autopilot



Brands that trust in us...





Get In Touch With Us!

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



+91 9355249992



info@anantya.ai



www.anantya.ai