



# 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



#startupindia



# 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.



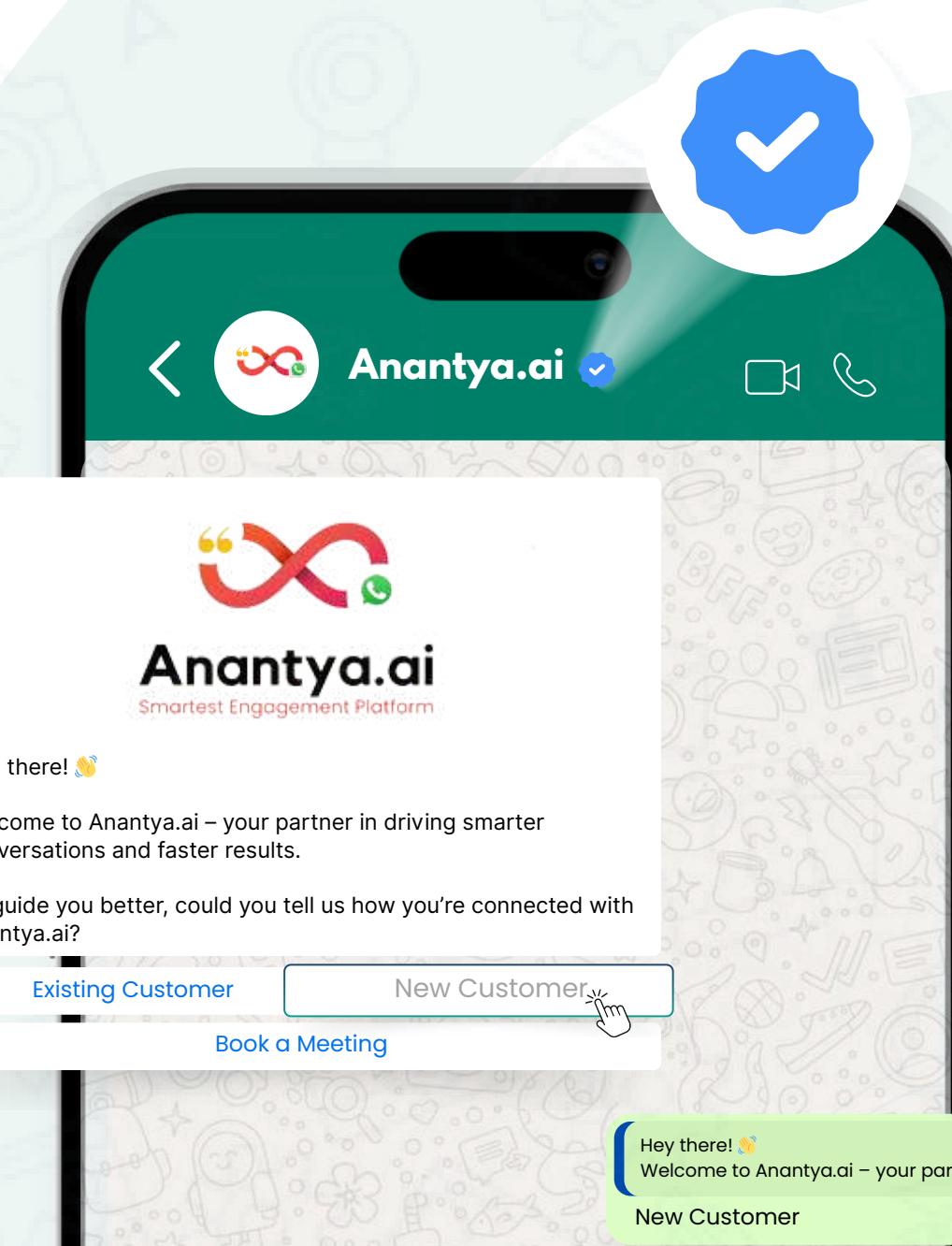
# Built for Conversations, Trusted for Results

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



# 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



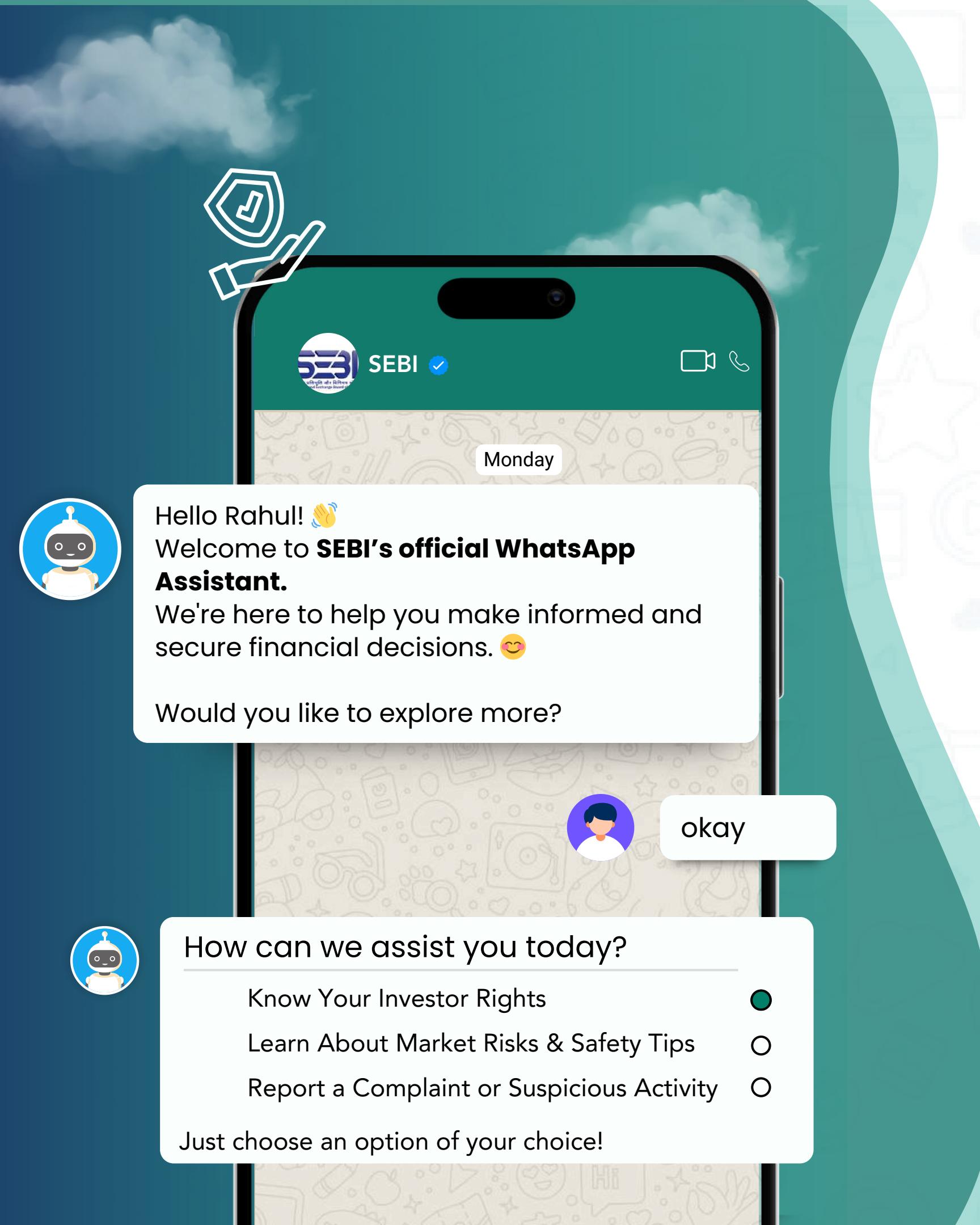
OFFER 24/7 MULTILINGUAL  
CUSTOMER SUPPORT



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**

# 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

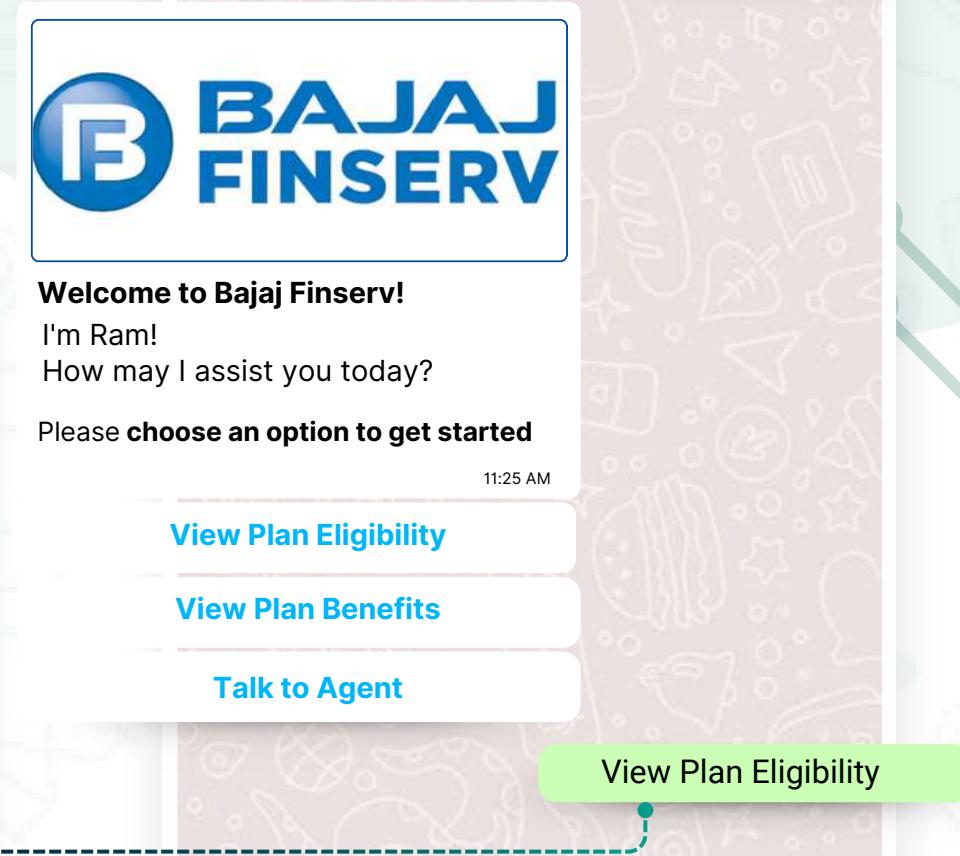
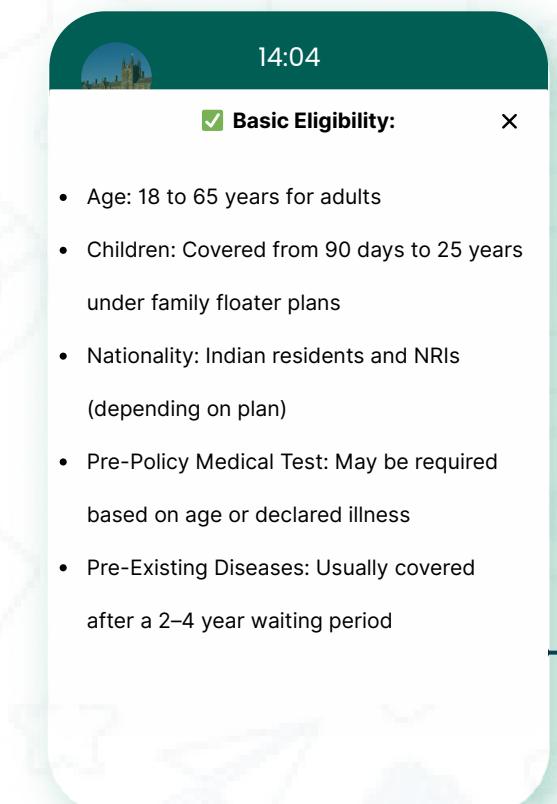
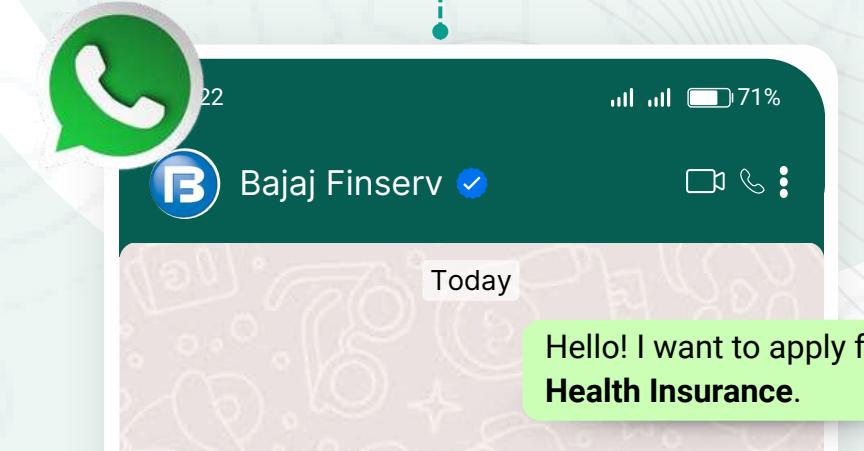
Feature: **Omnichannel** (Website, SMS, Live Chat, WhatsApp)

- 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.



## 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

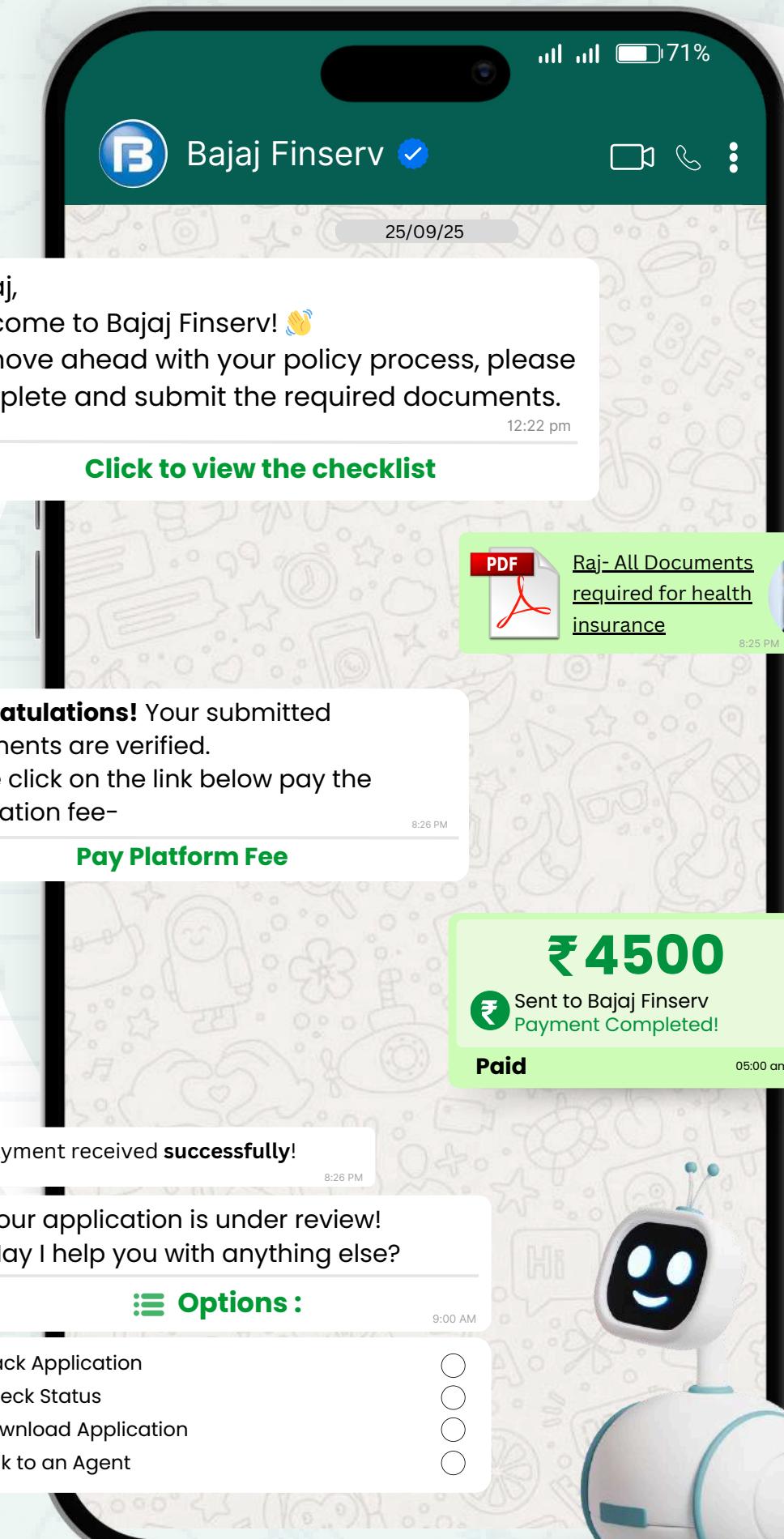
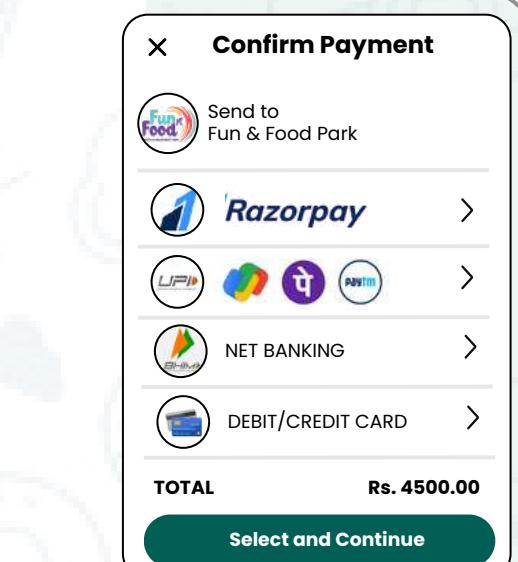
- **Use UPI/payments** within WhatsApp for premium payments, top-ups, or service fees with **zero redirects**.

## Customer Journey & Status Tracking Made Simple

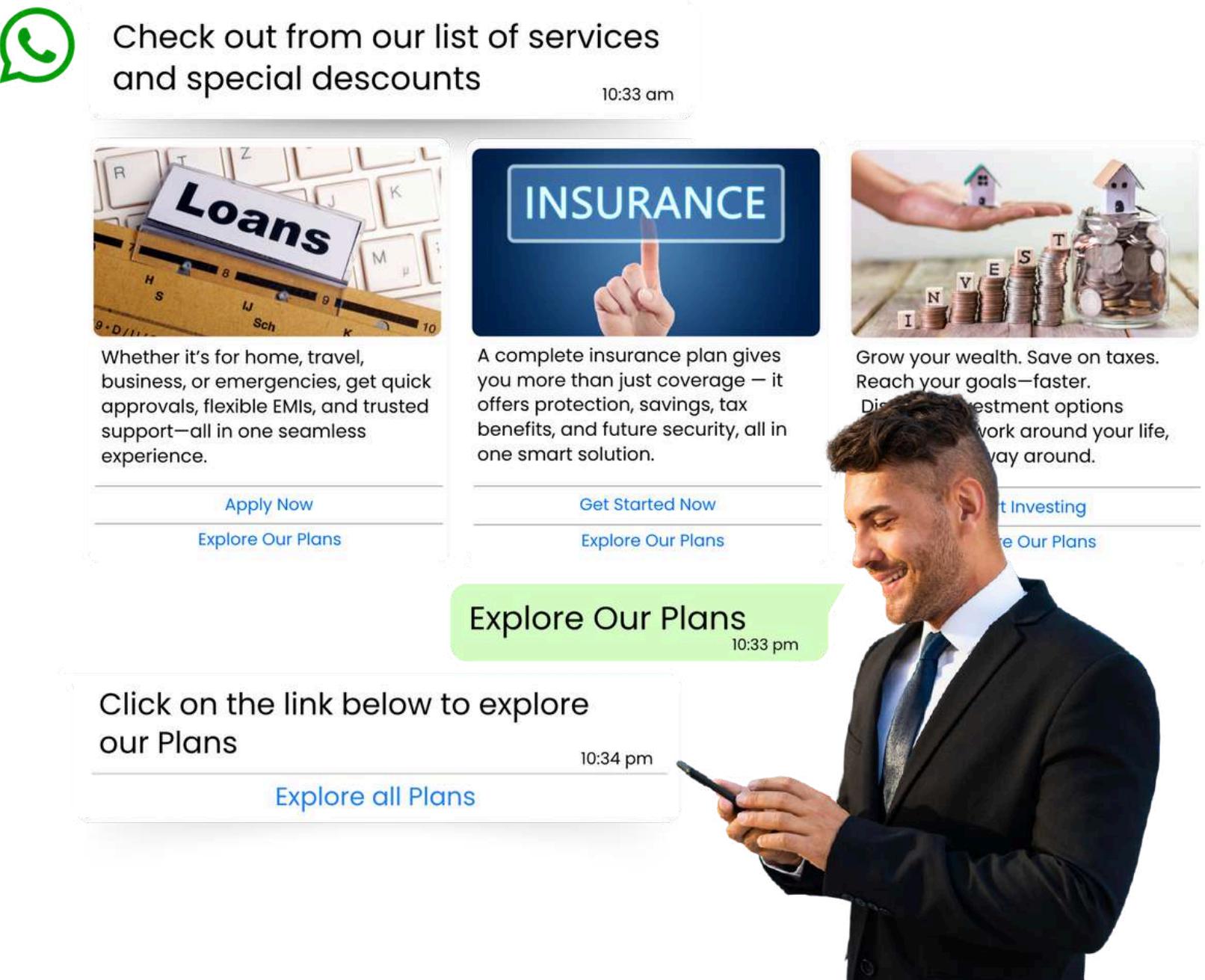
### Feature: LMS & Smart Labels

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

Different Payment Methods to Choose from



# Smarter Engagement Starts on WhatsApp



## 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

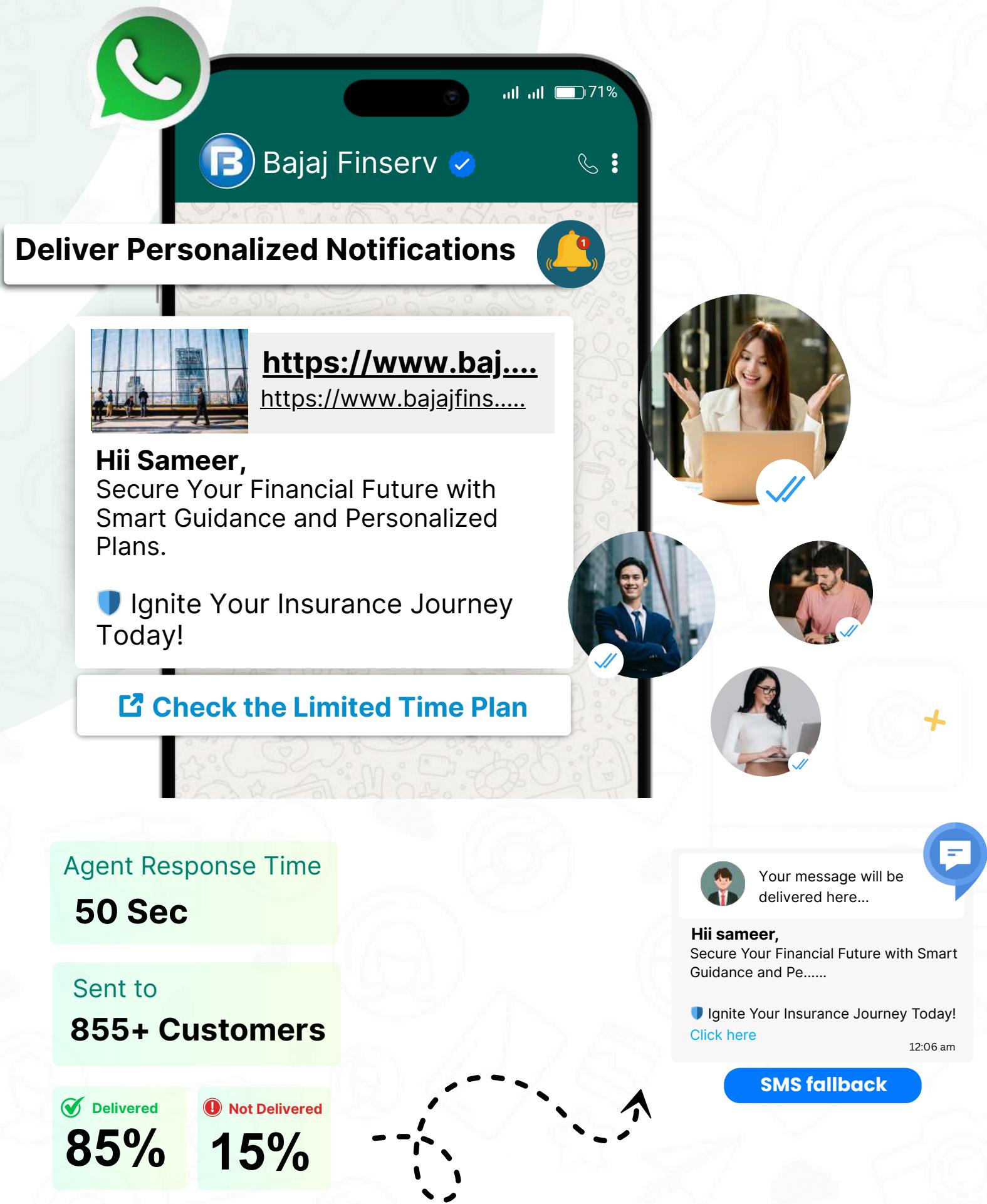
Auto-schedule medical checks, send premium reminders, and reschedule appointments or callbacks—all via WhatsApp.

## Customer Onboarding & Support

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

## Document Collection & Verification

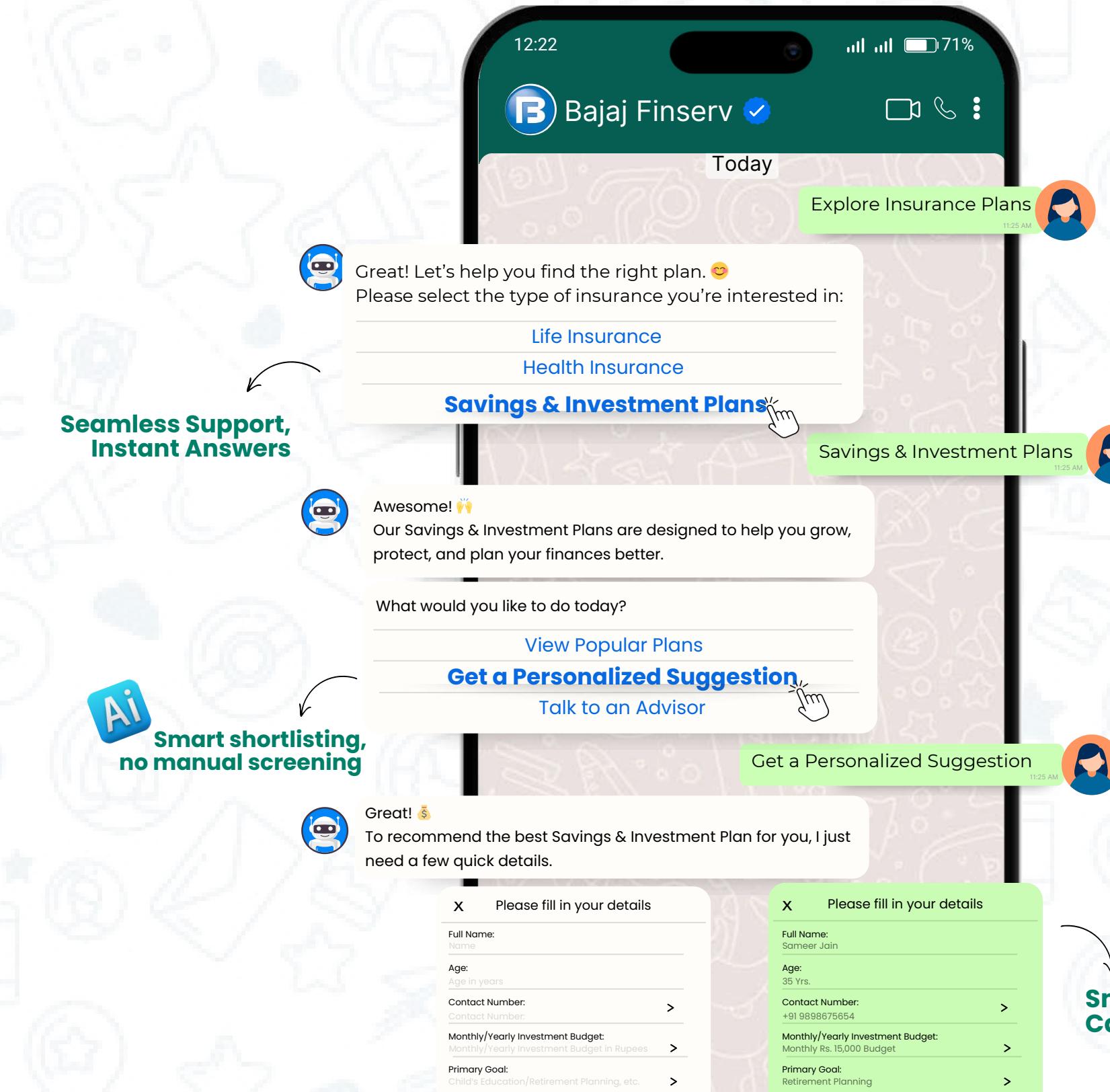
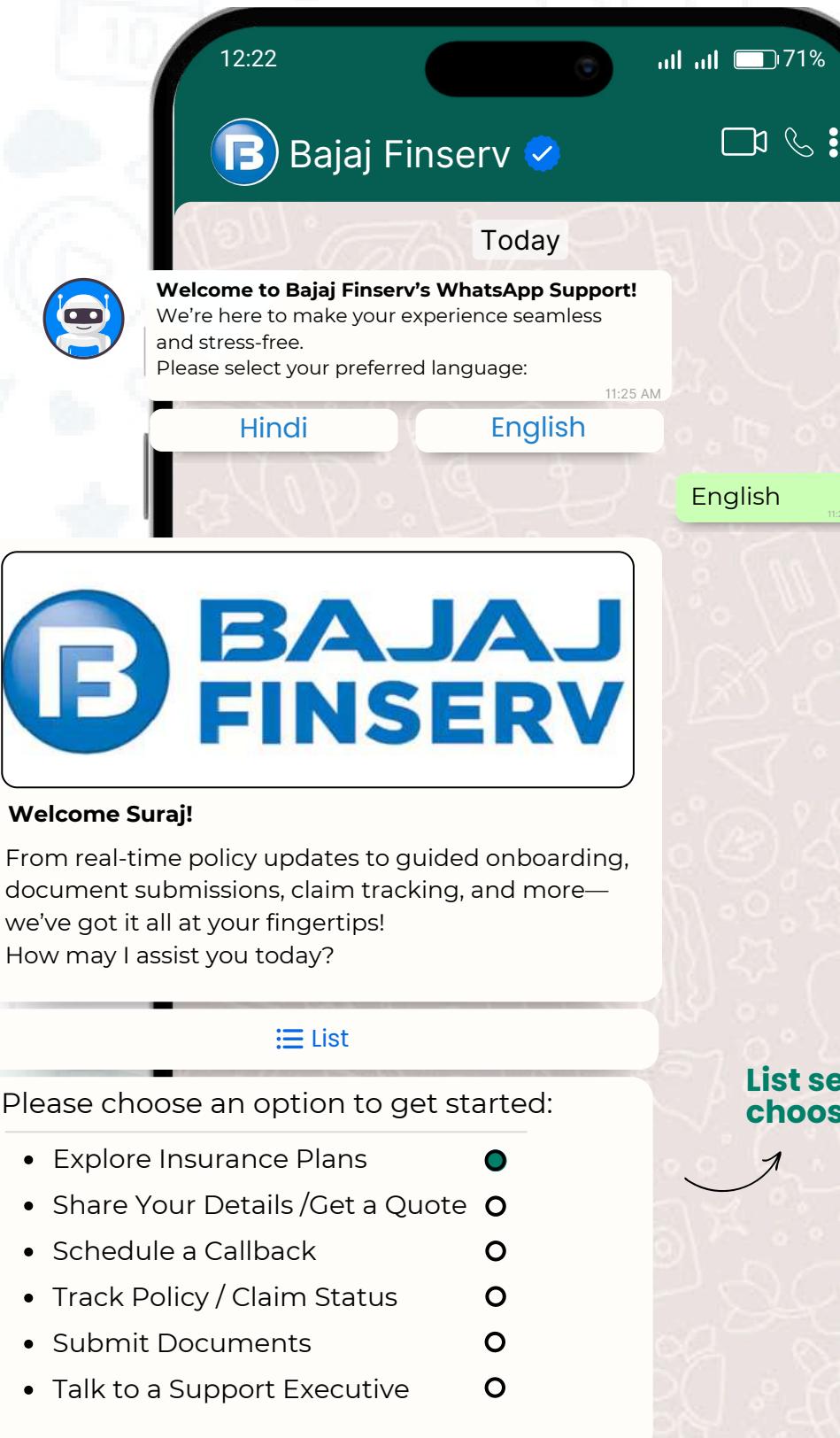
Securely collect KYC documents, medical reports, claim proofs, and policy acknowledgments—directly on WhatsApp.



# 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



# Smart Loan Support, One Chat Away

The image displays two side-by-side mobile phone screens illustrating a conversational AI support experience for Bajaj Finserv. The background features a repeating pattern of various digital icons.

**Left Screen (Automated Campaigns):**

- 12:22, 71% battery.
- Chat with Bajaj Finserv.
- Today: Bajaj Finserv starts with a welcome message: "Hello Suhani, how are you doing today? Welcome to Bajaj Finserv's Support Chat. We're here to make your loan journey simple, clear, and stress-free—every step of the way. 😊 How would you like to begin?"
- Suhani responds: "I need help with something".
- Bajaj Finserv replies: "All good for now, thanks!"
- Bajaj Finserv asks: "I need help with something".
- Suhani responds: "Got it, Suhani! 😊 Before we dive in, could you let me know where you stand with us?"
- Bajaj Finserv provides a list of options:

  - Please choose an option to get started:
    - Need help with existing plan
    - Existing customer – explore new plan
    - New here – exploring plan & services
    - Track my application
    - EMI or payment query
    - Talk to support
  - Radio buttons for selection.

- Suhani responds: "List all your services".
- Bajaj Finserv replies: "New here – exploring plan & services".
- Bajaj Finserv concludes: "Great to have you here! 😊 We offer a range of financial solutions to meet your needs. What would you like to explore today?"
- Options: Investment & Savings Plans, Cards & Financial Tools, Loans – Personal, business & more.

**Right Screen (Seamless Support, Instant Answers):**

- 12:22, 71% battery.
- Chat with Bajaj Finserv.
- Today: Bajaj Finserv suggests: "Loans – Personal, business & more".
- Bajaj Finserv asks for documentation: "Great choice! 📦 To help you check your eligibility and suggest the best loan options suitable for you, please upload any one of the following document:
  1. Pan Card
  2. Aadhar Card
  3. Latest Payslip or Bank Statement".
- Suhani uploads a PDF file: "Suhani- Copy of Scanned Aadhar Card".
- Bajaj Finserv confirms: "Thanks, Suhani! 📢 Your document has been received securely. 🔒 I'm now reviewing it to match you with the best loan options."
- Bajaj Finserv offers follow-up actions: "While I process it, would you like to:
  - Get a call from a loan expert
  - Track review process
  - Schedule an appointment".
- Suhani selects: "Schedule an appointment".
- A modal window titled "Book Appointment" appears, prompting for "Select Date" (dd-mm-yyyy) and "Preferred Time Slot" (hh-mm). It also includes fields for "Meeting With" (Not Mandatory) and "Meeting Agenda".

**Central Labels:**

- Automated Campaigns
- Seamless Support, Instant Answers
- AI Smart automation, with integrations
- Easily apply/track request

# Your Daily Banking, Now on Autopilot

The image displays two screenshots of the SBI WhatsApp Banking application, set against a background of various banking-related icons like gears, coins, and documents.

**Left Screenshot (Automated Campaigns):**

- Header:** SBI Today
- Content:** SBI logo with the tagline "The banker to every Indian".
- Text:** "Elevate Your Banking Experience with Our Latest Innovation!"
- Message:** "Dear Rahul,  
Introducing WhatsApp Banking- Your 24/7 Connection to Financial Excellence!  
We're committed to redefining your banking experience. Embrace the future with WhatsApp Banking and discover a world of financial possibilities at your fingertips.  
How to Get Started?  
Click on button below!"
- Buttons:** "Select your Query" (dropdown menu), "Balance Inquiry" (green button).
- Callout:** "List all banking services to choose from" points to the dropdown menu.
- Text Overlay:** "Automated Campaigns" with a blue robot icon.

**Right Screenshot (Personalised recommendations / upselling):**

- Header:** SBI Today
- Image:** A hand holding a blue credit card over a POS terminal.
- Text:** "Hey Neha,  
Congrats! You are eligible for a **SPECIAL CARD!**  
Apply for Credit Card and unlock all these benefits:
  - Scan & Pay on UPI (for RuPay Credit cards)
  - Interest free Credit Period up to 50 days
  - Earn reward points on spends
  - EMI facility for transaction above Rs. 2,000
  - Accidental Insurance Coverage
  - 5% Fuel Surcharge WaiverAnd more variant specific benefits.....
- Text Overlay:** "Personalised recommendations / upselling" with a blue robot icon.
- Text at Bottom:** \* T&C Applied!, Limited Time deal, don't miss out: [Apply Now](#), [Explore More benefits](#), [STOP Promotions](#).
- Callout:** "Easy hassel-free application" points to the "Apply Now" button.

# Brands that trust in us...



भारतीय प्रति भूति और विनियम बोर्ड  
Securities and Exchange Board of India





## 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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