



ChatCITCO

Optimizing the customer and internal support experience

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Defining the Problem

Part of a good user experience for clients is ensuring that they are able to contact support whenever they need.

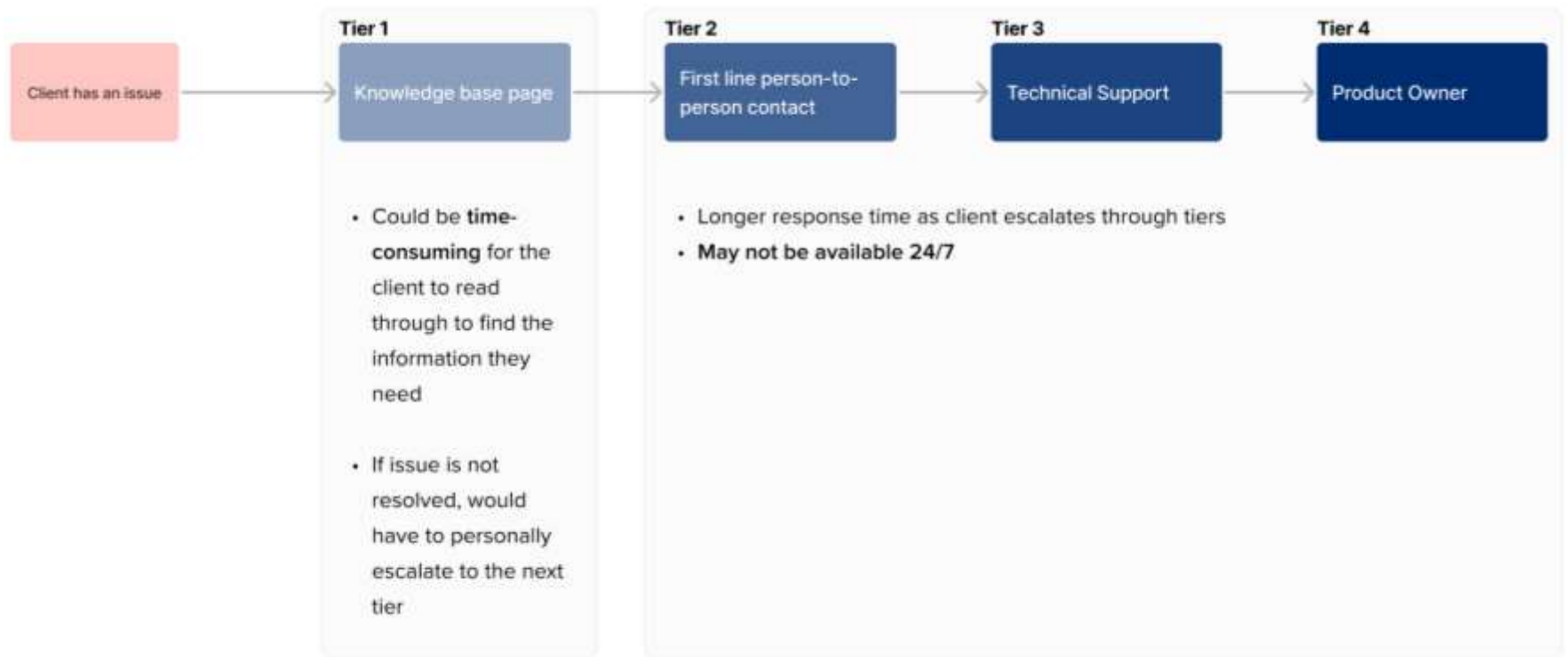
- Currently in most Citco products, there is little to no client support option integrated

How might we optimize Citco's support system to boost the client experience when using Citco products?

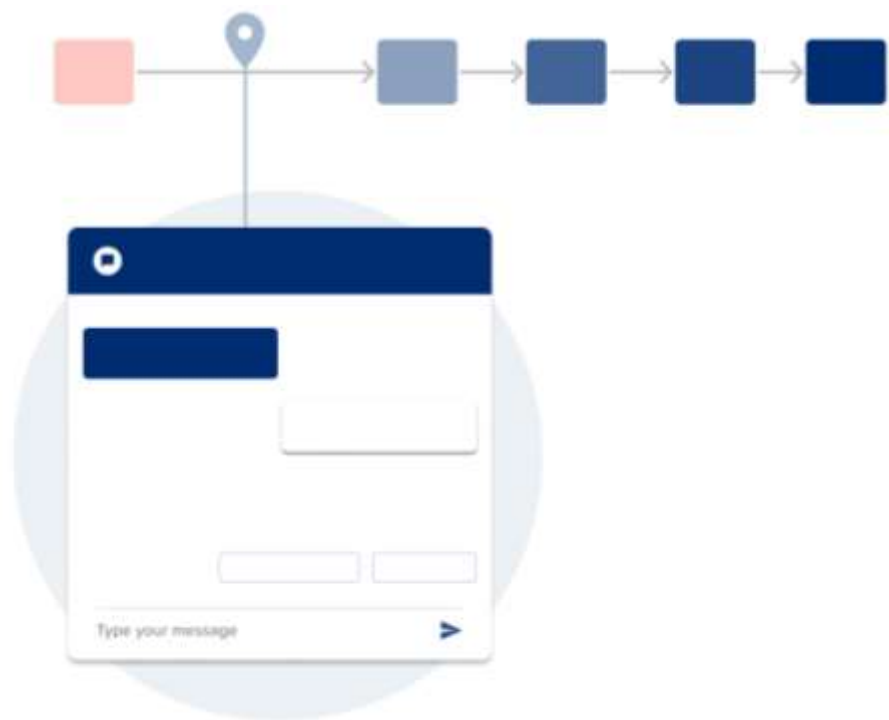
Common support tab options available for clients in Data Services, Waterfall and Treasury



Current Client Support System



Our Solution – ChatCITCO

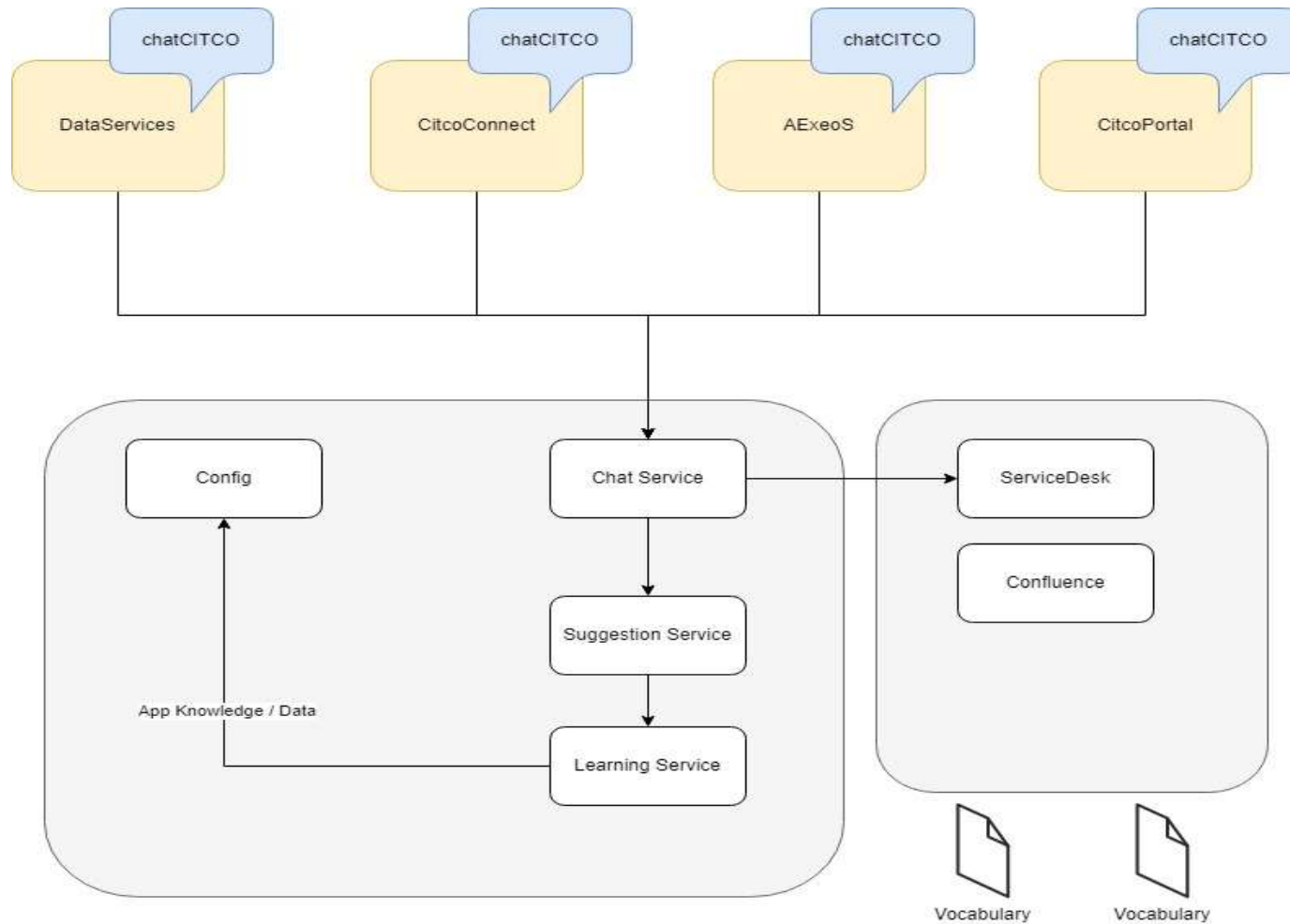


A Chabot that can be integrated amongst Citco products to offer clients a direct line for customer support.

Can also provide as an extra line of support for internal employees

- Significantly reduce the issues or requests going to human representatives; save time
- Available 24/7
- Improve response rate time
- Resolve issues more efficiently
- Offer another channel of support that the business can gain insights from

How It Works – Technical



Demo

Future Functionality / Implementations

Suggested guiding prompts as the user converses



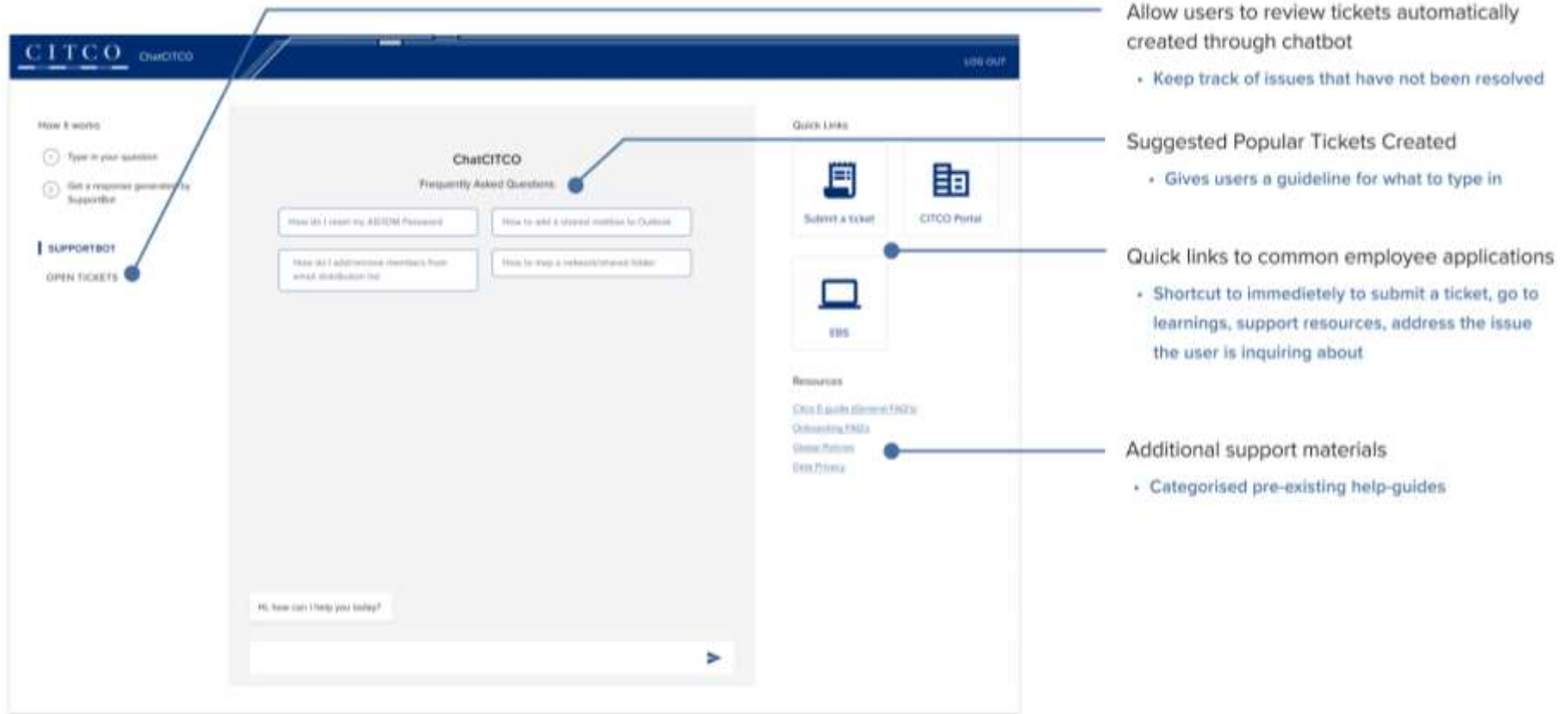
Review system for analyzing customer satisfaction



Including screenshots and attachments options for the user to provide a visual of their issue



Design



Questions?