

# GenAI - Customer Support Assistant for Customer Care Agents to Answer Complex Lending and Compliance Questions

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GROUP PRIORITY – DATA & AI

MAIN GROUP OFFER – AI ANALYTICS & DATA SCIENCE

SERVICE OFFERING – GENERATIVE AI FOR CUSTOMER EXPERIENCE

SECTOR – INSURANCE



World's largest  
credit union

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# GenAI - Customer Support Assistant for Customer Care Agents to Answer Complex Lending and Compliance Questions

**Context/Market Positioning & Competition:** The client, recognized as the world's largest credit union, serves over 13 million members with assets exceeding \$160 billion and a dedicated team of 24,000+. Operating across 350+ branches globally, they cater to the Armed Forces, Department of Defence, veterans, and families, delivering top-tier financial services.

## Challenges/Pain points:

- Integrating Power Virtual Agents with OpenAI and databases.
- Adapting agents to the new chat system may face resistance, requiring training.
- Ensuring accurate responses, particularly for complex queries.

## Gain points:

- Allows Customer Service Reps to access a knowledge base of 25,000 policy and procedure documents with a simple GenAI chat interface
- Minimized training costs and reliable information make the solution cost-effective.
- Power Virtual Agents and Open AI's RAG enable quick and efficient responses.

## Approach & Solution:

- Combine Power Virtual Agents (PVA) with Retrieval Augmented Generation.
- PVA uses Open AI embedding models to interpret user queries, accessing client Knowledge Bases via vector databases.
- LLM refines responses by stitching together top search results, ensuring reliable, plain English answers grounded in trustworthy information sources.

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BENEFITS DELIVERED

**15-20**

Projected  
NPS gains

**Faster**

Resolution

**Reduce**

Training Cost

## CONTACTS



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AI ANALYTICS & DATA SCIENCE

CUSTOMER FIRST