DATASHEET - AI AGENTS (VOICE)

Enhance Your Member Experience

AI Voice Agents is the industry's first generative AI-driven solution designed specifically for community financial institutions to elevate member experience and digital engagement. Equipped with advanced Safe AI technology, AI Voice Agents provide robust self-service capabilities and operational efficiency. Seamlessly integrating into your existing phone system and core banking platforms, it automates transactional workflows with precision and reliability.

eltropy AI

Up to

99%

accuracy in knowledge responses

Contain up to

80%

of voice calls* reducing operational load

10x

faster deployment compared to traditional solutions

24x7

availability - ensuring anytime, anywhere support

Multi-language

capabilities to reach 30-40% more members

* Results may vary based on the credit union's knowledge base and training.

AI Impact

Innovative Generative AI-Driven Solution

AI Voice Agents is the industry's first generative AI-driven solution that seamlessly integrates with your existing phone system and core banking platforms. This ensures the automation of transactional workflows and enhances communication across various channels, leading to a cohesive experience for your members. The advanced Safe AI technology allows community financial institutions to improve member experience and digital engagement while optimizing operational efficiency.

Benefits

No Conversation Designing

Cuts 95% of design time.

No Language Translation Required

Saves 40% of overall implementation time.

No Escalations Due to Non-Compliances

Ensures adherence to policies.

No Spreadsheets, No Maintenance Hassles

Simplifies operations.

Smart Routing

AI Agents intelligently route calls to the appropriate Eltropy Queue or transfer externally based on context, ensuring seamless member experiences and efficient resolution.

24/7 Support in Any Language

Communicates in the member's preferred language.

Comparing Old & New

	v1	v2 (genAI)
Interaction Type	Menu-based (Predetermined)	**Conversational AI (Flexible)**
Knowledge	Predetermined FAQs	**Knowledge Base Response**
Voice Response	Artificial / Robotic	**Humanized Voices**
Personalization	No Personalization	**Highly Personalized**
Languages	Limited Support	**Multilingual (Up to 10 languages)**
Maintenance	Managed Service	**Self-Service (10x Faster)**

Safe AI Guardrails

Product Positioning Layer	Usage & Best Practices Guide User Responsibility Messaging to Indicate Interaction with AI
Application Design Layer	Provide Post Call Transcript Provide an Easy Way to Escalate to an agent Escalate on Failure Provide an easy way to report/provide feedback Limit response length Ask user confirmation before writes/changes
Programmable Guardrail Layer	Semantic routing and Out-of-scope detection Output validation for Core Data Abstract/Obfuscate PII/Sensitive data
Model Layer	Measures taken to reduce hallucination Harmful content filters, bias mitigation Finetuning and alignment process

Key Features

GenAI Knowledge Based Responses
Provides accurate and contextual answers.

Intent-Based Responses
Understands and resolves member queries intuitively.

Core Automation Workflows (Read/Write)
Automates transactions with direct integration to the core.

Intelligent Process Automation
Calls tools and processes dynamically.

Humanized Voices
Creates a natural and empathetic member interaction experience.

Multilingual Deployment
Supports multiple languages for wider accessibility.

No-Flow Design
Speeds up deployment by 10x with streamlined configuration.

SafeAI Architecture
Ensures robust data security and compliance.

Live VoiceCP Link
Enables multimodal and multi-channel communication.

Agent Performance Insights Dashboard
Tracks performance and identifies areas of improvement.

Auto-Quality Scoring & Alerting Mechanism
Ensures high-quality interactions.

Personalized Next-Best Product Recommendations
Suggests tailored financial solutions.

AI Voice 2.0 Components-Architecture

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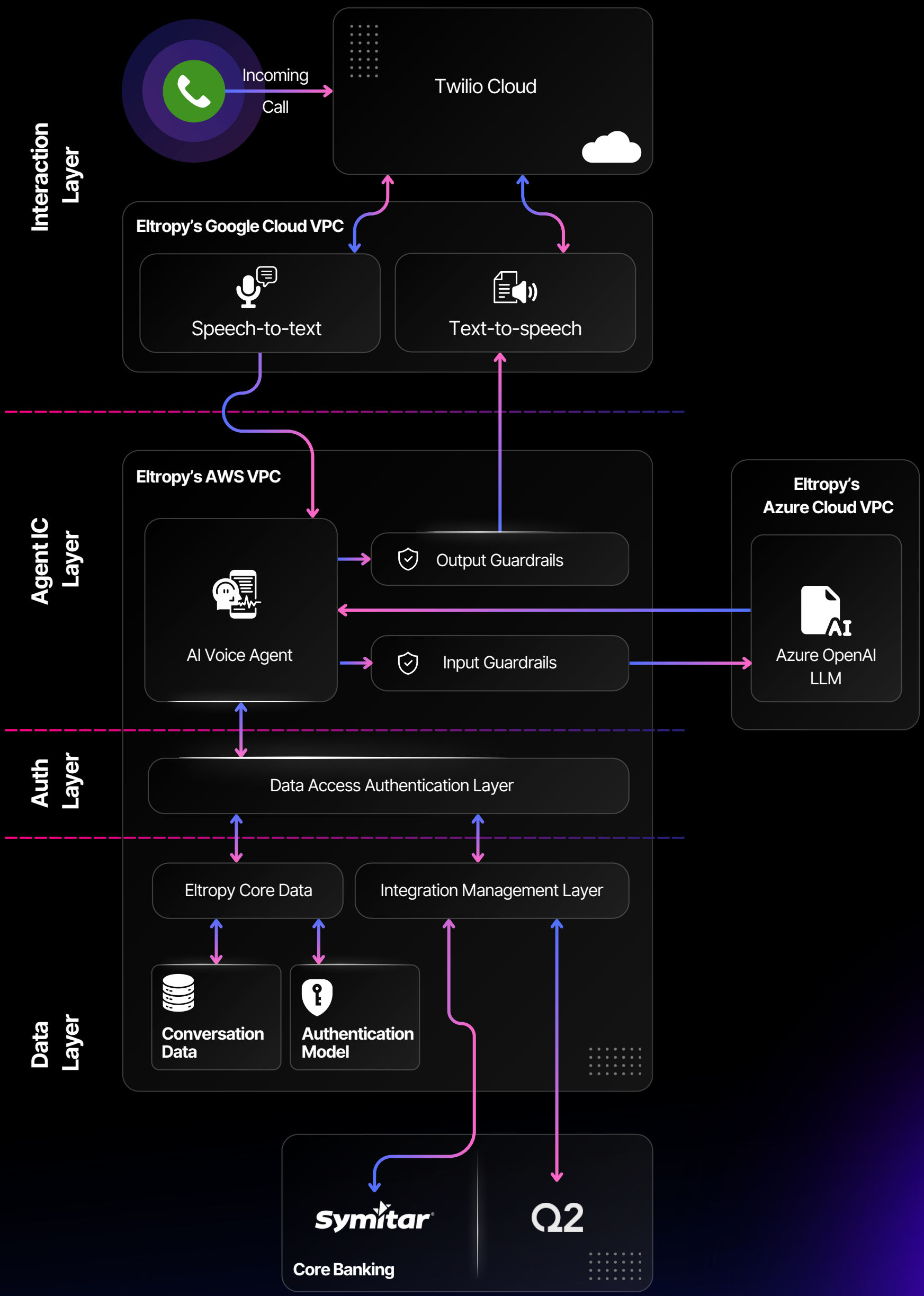

AI Voice 2.0 High-Level Workflow

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"What is my routing number?"

Live Voice link
via SMS

General Knowledge

AI Routing

Call Transfers

Voice AI Agent 2.0

Integration Layer

Authentication
Voice Biometrics
Device Biometrics
Native Authentication

Member APIs
(Read only)

Member APIs
(Write actions)

[x] APIs

Product Capabilities

AI Website Navigation

Enable seamless and intuitive website navigation powered by AI, allowing members to find information and complete tasks on your digital platforms easily.

GenAI Knowledge Response

Leverage a robust Knowledge Base Response system to provide instant, accurate answers to member queries, enhancing self-service capabilities and reducing wait times.

Robust Knowledge Management System

Deploy an AI Knowledge Management System that intelligently organizes and retrieves information, ensuring members access the most relevant and up-to-date content.

Advanced NLU for Request Understanding

Utilize advanced Natural Language Understanding (NLU) to accurately interpret member requests, ensuring precise and relevant responses for a superior member experience.

Automatic Multi-Language Support

Offer multi-language support to cater to diverse member demographics, ensuring clear and effective communication in their preferred language.

Safe AI

Safeguard user data, adheres to regulations, and emphasizes transparency, ultimately ensuring a secure and trustworthy AI experience for users.

Transfers to Agent on Any Channel

Facilitate seamless transfers to human agents across any channel, ensuring members can easily escalate their inquiries when needed.

Comprehensive AI Agent Performance Insights

Gain in-depth analytics on your AI Agent's performance, empowering you to monitor, optimize, and fine-tune its operations for maximum efficiency and effectiveness.

Integrate into Your OLB Platforms & Apps

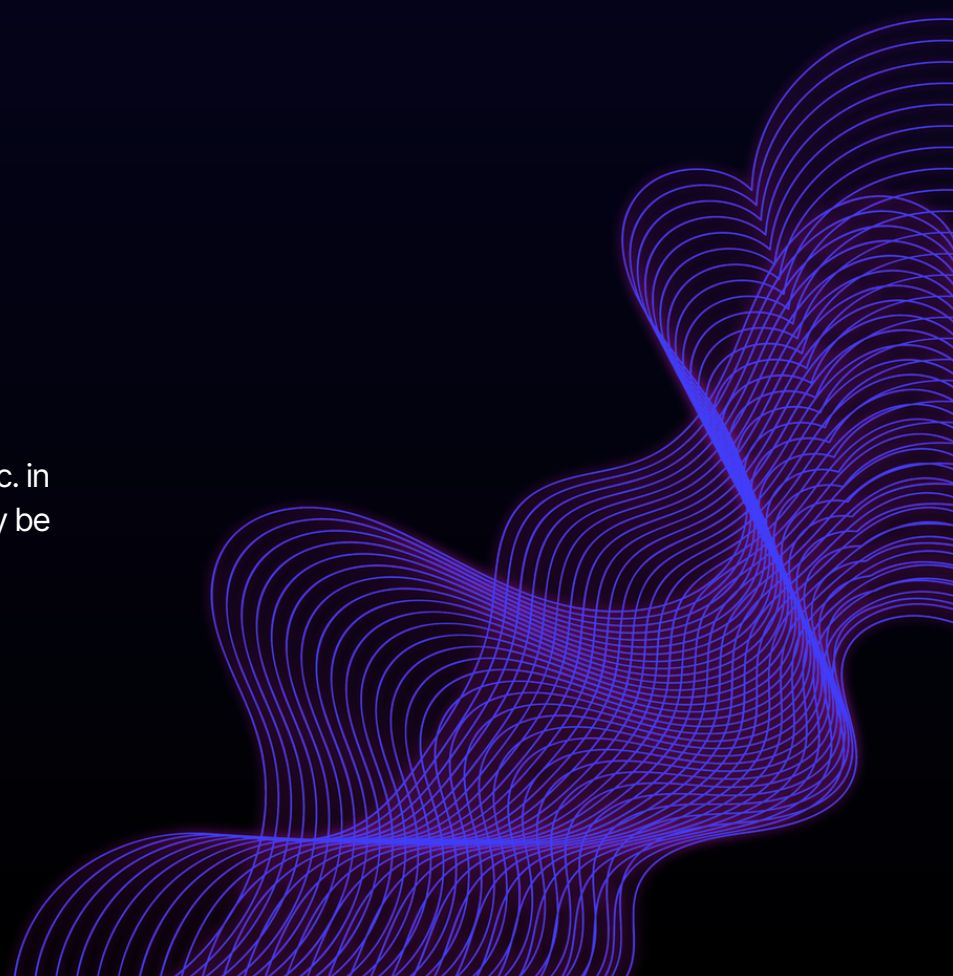
Easily integrate AI Agents into your existing online banking platforms and mobile applications, enhancing functionality and providing a unified member experience.

Voice Banking, Humanized.

Empowering financial institutions with cutting-edge AI to redefine the future of member experience.

AI Voice Agents represents a new era in AI-driven communication for community financial institutions. By leveraging Safe AI this solution empowers credit unions to enhance member satisfaction, optimize operational efficiency, and deliver personalized experiences at scale. With 24/7 multilingual support and intelligent automation, it's more than a tool—it's your trusted partner in revolutionizing member engagement.

Learn more at: https://eltropy.com/ai/eltropy-ai-agents/



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