



## Unified Conversations Platform

# Introductions

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# What Makes A Credit Union Thrive?

## Relationships





How did  
relationships happen?

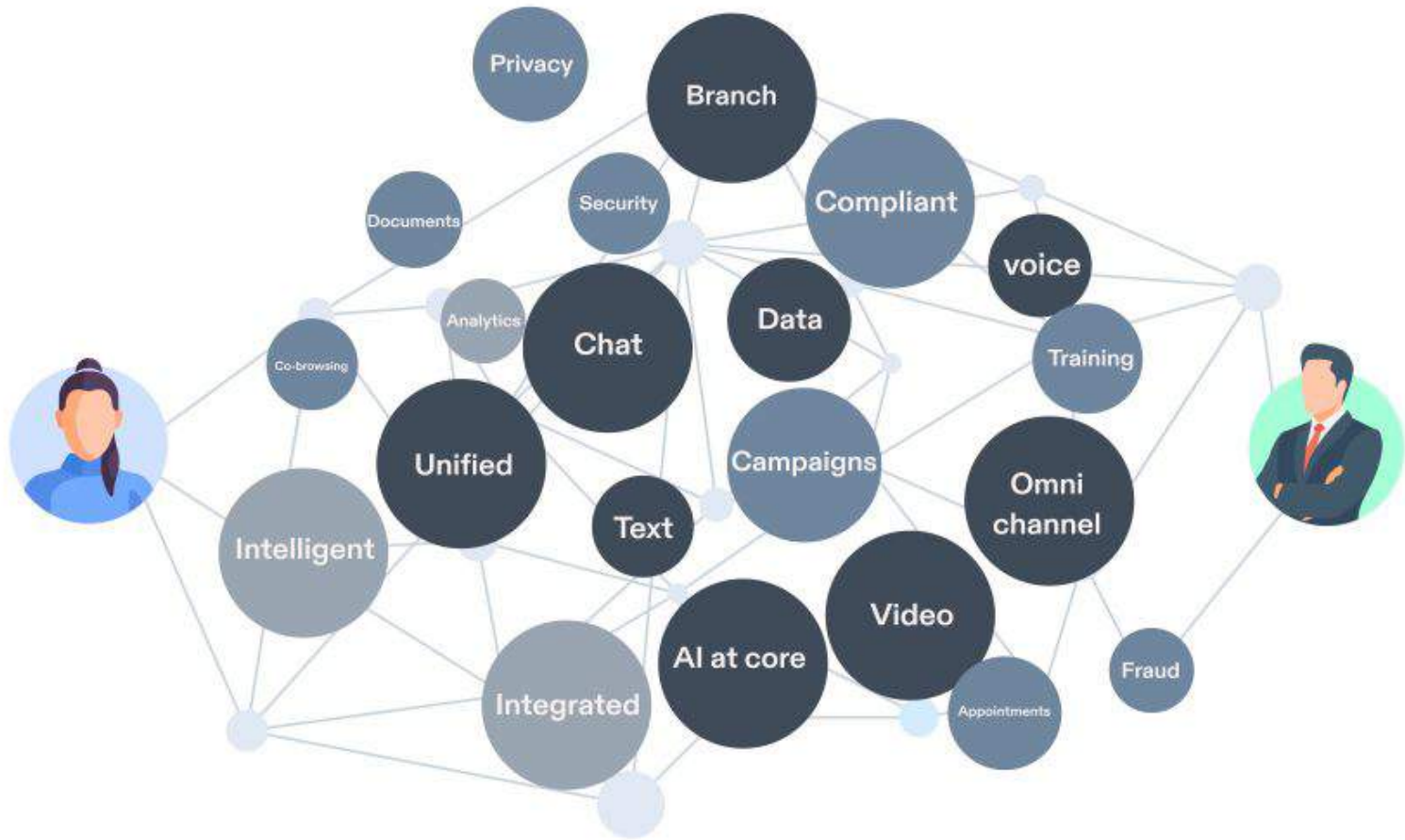


**How conversations  
happen today?**

With Choice comes  
**Complexity**









# 40%

members leave  
before becoming  
profitable

# 51%

CU leaders say talent  
retention and recruitment is  
their #1 concern.



Are you really getting the  
**timely, relevant, personalized conversations**  
that build **relationships** and drive growth?

# Unified Conversation Platform



# Your Front-line Staff



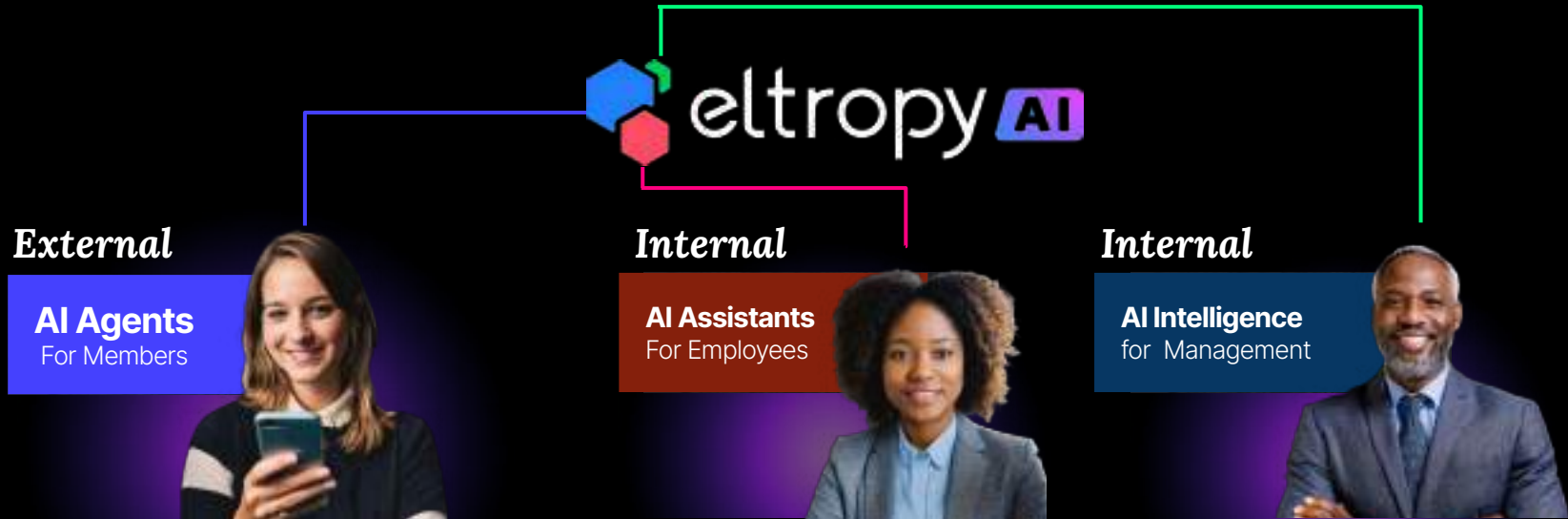
How can I open an IRA?

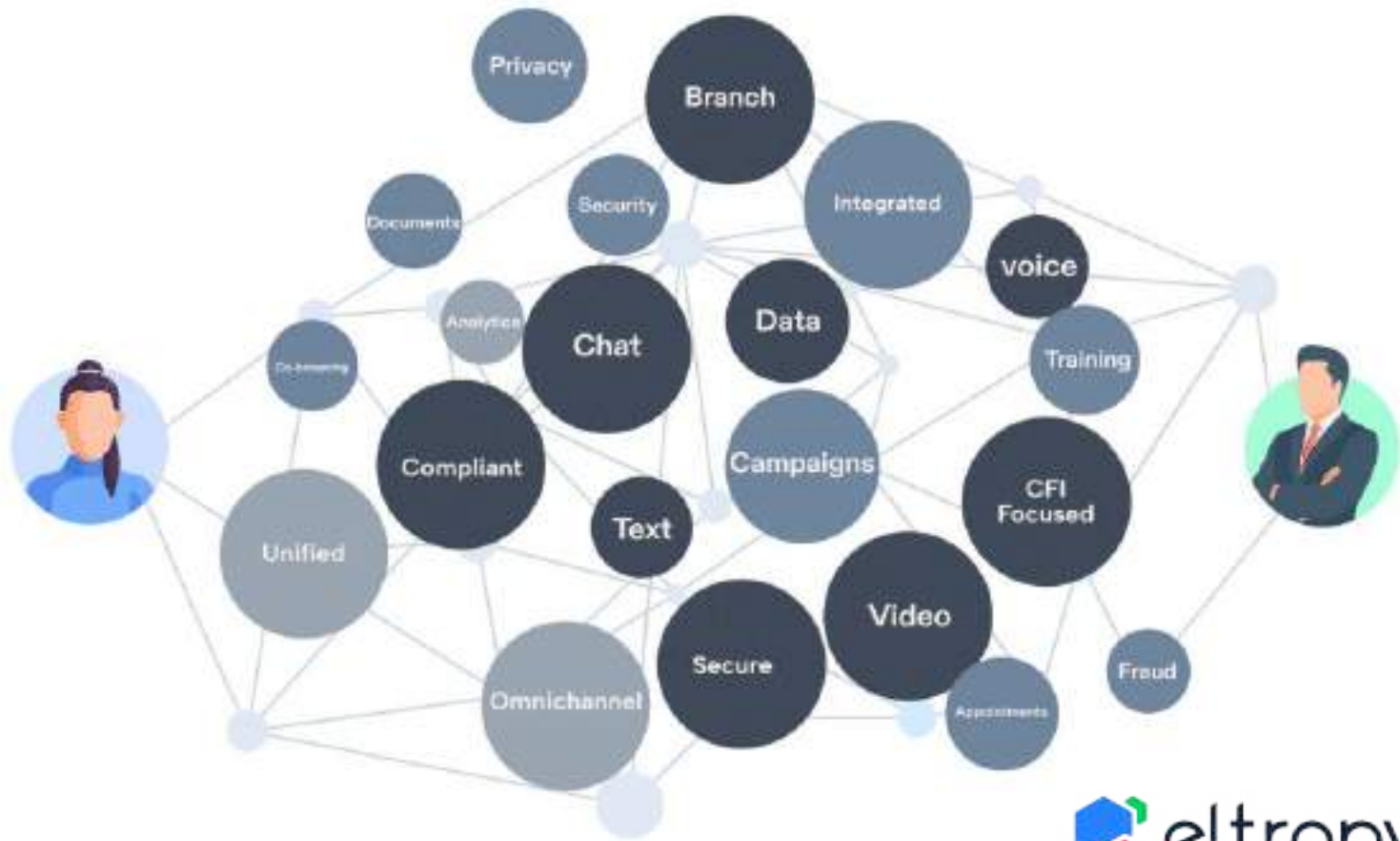
Let me check with my supervisor.



# All the Power of Data + AI

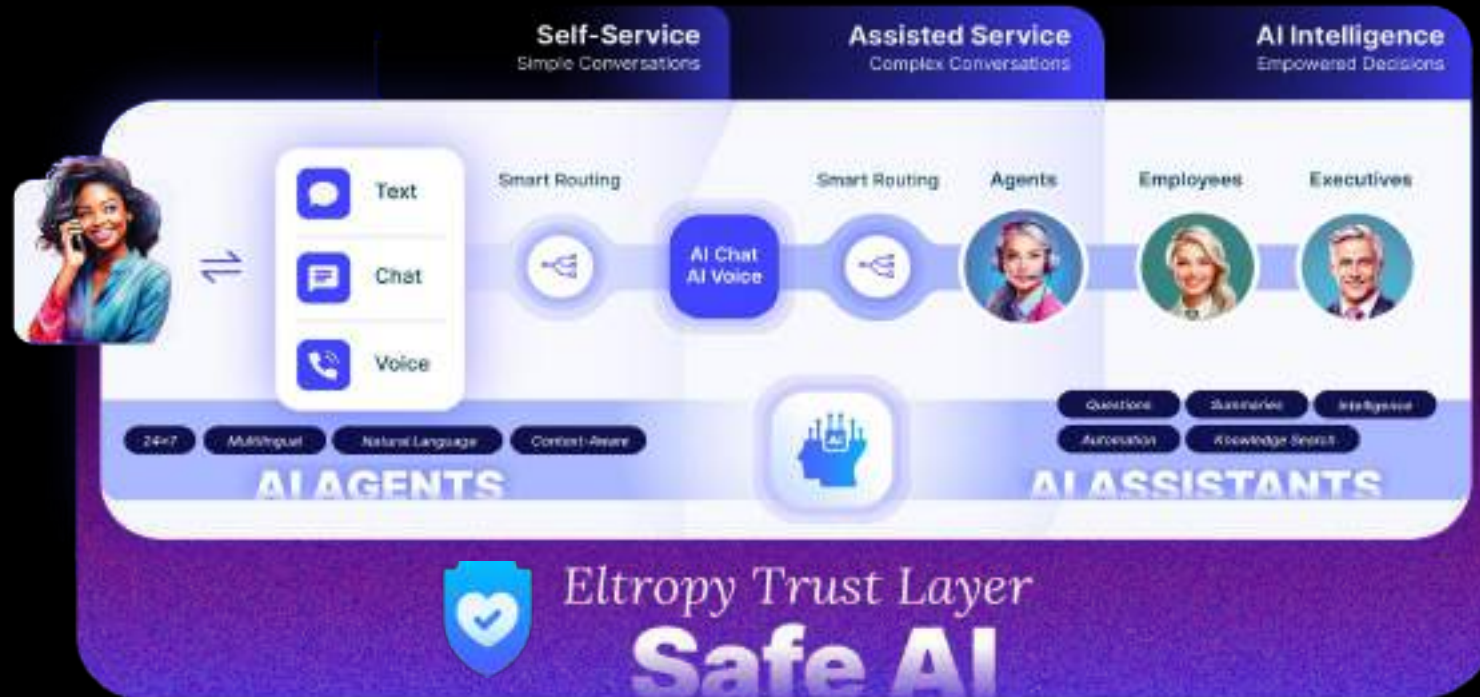
## ONE UNIFIED PLATFORM





# All the Power of Data + AI

## ONE UNIFIED PLATFORM



## Mission

Help People Access the Best  
Financial Products & Services  
Anytime, Anywhere

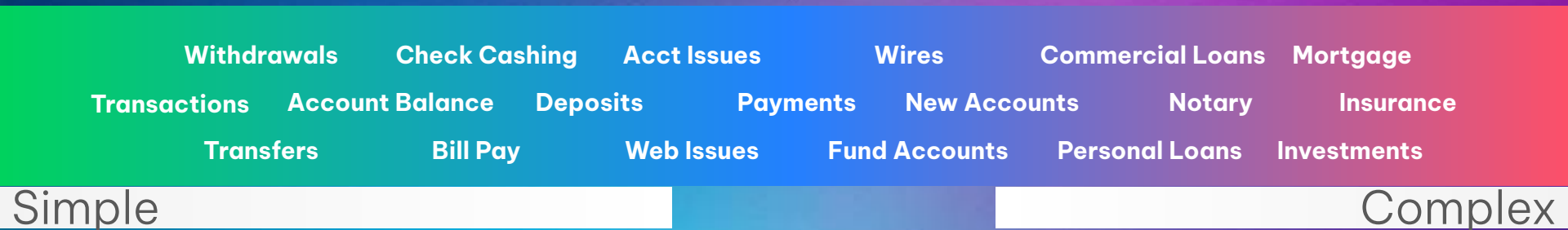




# Financial Conversations with Members



Tanya



# Financial Conversations with Members

## Simple Conversations

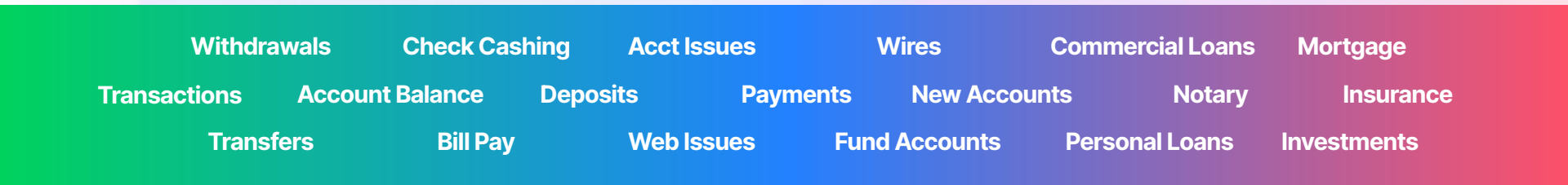
Higher Volume  
Lower Value



Member

## Complex Conversations

Lower Volume  
High Value



Simple

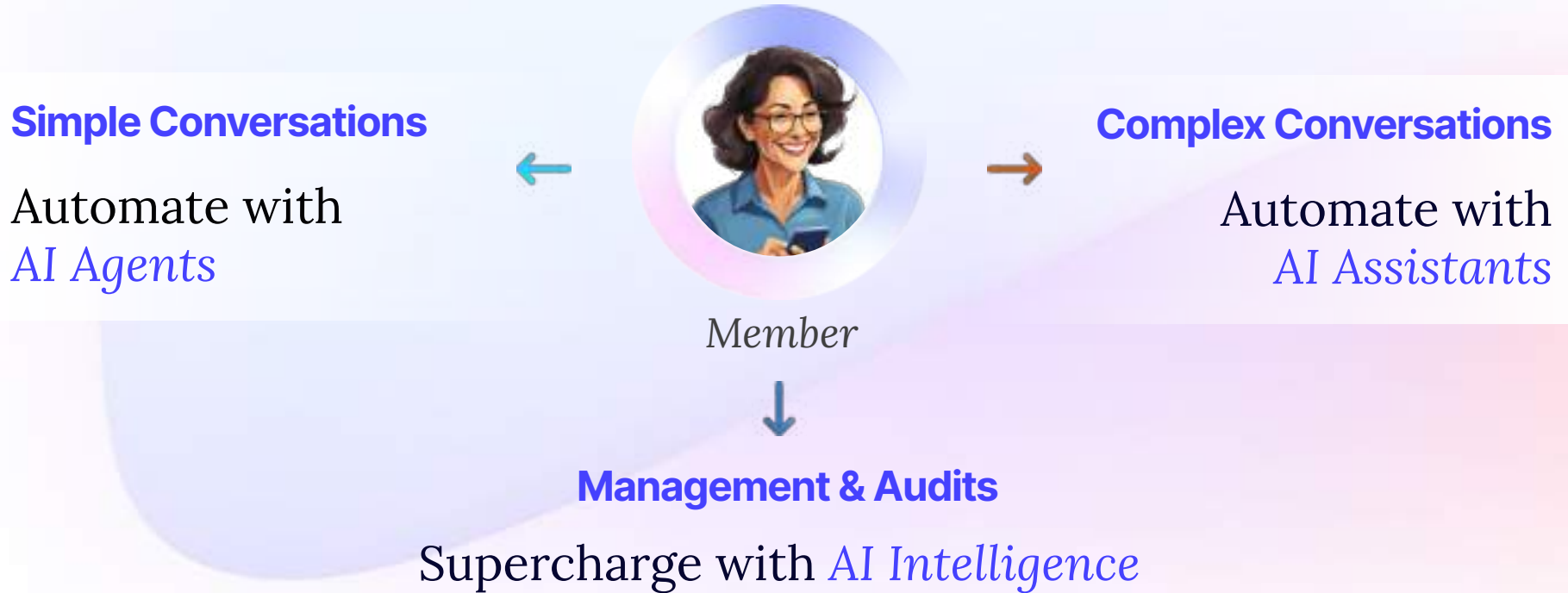
Complex

## Management & Quality Audits

What if we automate the lower value conversations and augment the higher value conversations?



# Automate the Simple. Augment the Complex.



# UPGRADE YOU.

Building trust, nurturing dreams, inspiring hope.

ABOUT

CONTACT

LOCATIONS & ATMS

CLOSURES

NEWSLETTERS

COMMUNITIE

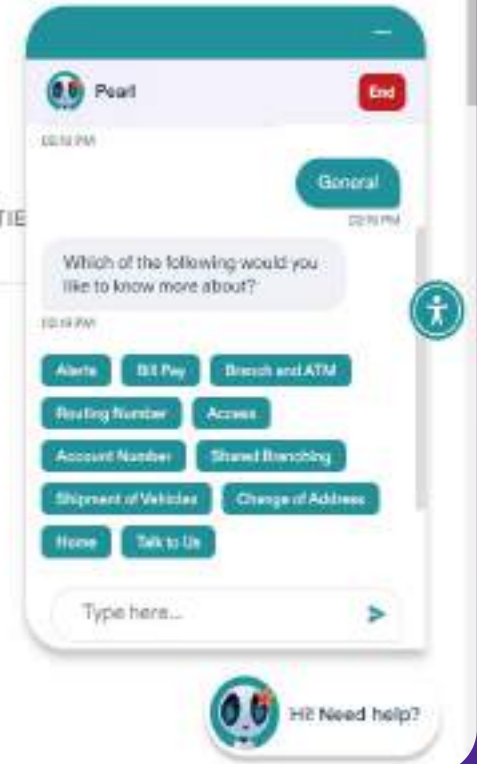
## CALL



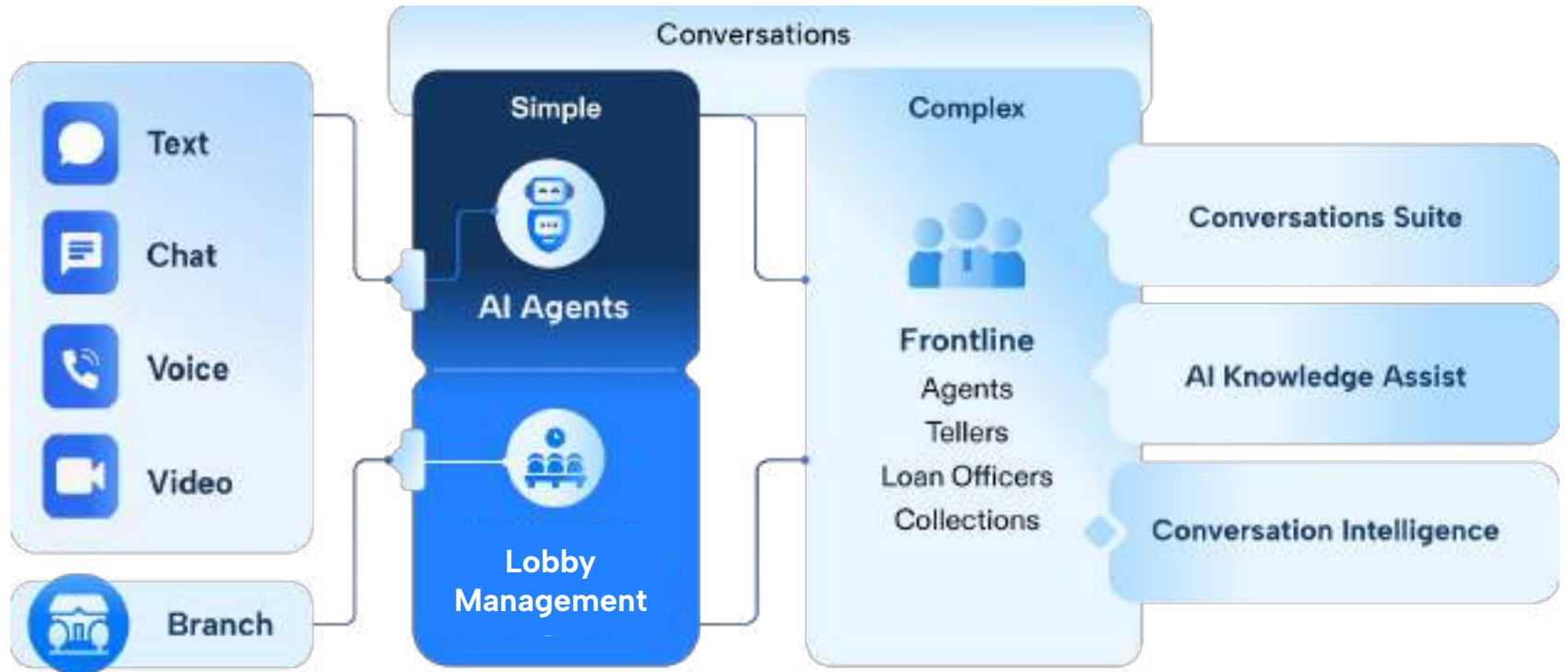
808.737.4328 (73-PHFCU)



Order Checks 877-838-5287



# Platform at Work



# The Platform

## Complete Engagement Suite

- Unified Inbox
- Single Conversation Thread
- Co-browsing
- Transfer, Conference
- Built-In Workflows
- Document Mgmt
- Channeless
- 1:1 or 1: Many Texting
- True Video Banking
- Reputation Mgmt
- Lobby and Appt Mgmt
- In-branch video kiosks

## AI Agents + Assistants

- AI Agent
- Knowledge Assistant
- Co-pilot
- Conversation Intelligence

## Analytics and Intelligence

- Unified reporting
- Live Monitoring/Playback
- Custom Value Mapping
- Opportunity Analysis

# An Integrated Ecosystem

# 35+

# CFI-Specific Integrations







**Security  
Compliance**



## Communications

Text. Chat. Voice. Video. Phone. Branch

## Automation and Intelligence

AI-Voice, AI-Chat, AI-Text, AI-Video.  
Generative AI, Data Analytics

## Systems Integrations

Core. LOS. AOS. Collectons. CRM. OLB...More

# ONLY ENTERPRISE-CLASS SOLUTION



**Marketing**



**Lending**



**Collections**



**Contact Center**



**HR**



**Tellers/ATM**



**Compliance**



**IT**



**Finance**

# Best in Class

## Lending



**>90%**

Reduction in loan approval times

**20%**

Lesser rate of delinquency

**60%**

Drop in call volumes on loan applications

**>2%**

Annual increase in closed loans

## Contact Center



**30%**

Reduction in AHT

**96%**

AI Contained Requests

**50%**

Reduction in abandonment rate

**125+**

Hours saved per employee per year

## Collections



**>40x**

Collections member engagement

**>6%**

Decrease in charge-offs

**\$150K+**

In annual recoveries for an average midsize credit union

## Marketing



**500%**

Increase in Engagement

**37%**

Higher CTR compared with 3% over emails

**250%**

Higher conversion rate

# Why?



## Product

The Only Complete  
Solution



## Performance

Guaranteed ROI  
Unmatched CSAT



## Partnership

Exclusively  
Dedicated to the  
CU Movement

# Dedicated to the CU Movement

**600+**  
Customers

**35+**  
Integrations

**300M**  
Conversations\*

Best **AI-powered Digital Conversations** platform

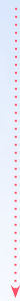


\*Last 3 years and CFIs only



All Channels  
All Conversations  
All the Power of AI

# ONE PLATFORM



# Do More. Get More. WITH ONE





# QUESTIONS



# Our Stories

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The best part about technology is seeing what the world does with it.