engagely.ai

WHATSAPP BOT

Be Where Your Customers Are.

Hello!

engagely.ai
By Exponentia

2014
Year of Inception

70+
Enterprise Customers

200+
Experienced Professionals

Partners

aws partner network

Microsoft Partner

freshworks

EY

Qlik

Google

Global Presence:

UK | Singapore | UAE | India

Global Customers

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Insurance
- SBI General INSURANCE
- Edelweiss | GENERAL INSURANCE
- HDFC Life — Sar utha ke jiyo!
- SBI Life INSURANCE — With Us, You're Sure
- ICICI PRUDENTIAL LIFE INSURANCE
- MARSH & McLENNAN COMPANIES
- Star Union Dai-ichi Life Insurance

Healthcare
- vHealth by aetna
- METROPOLIS — The Pathology Specialist
- DA DOCTOR ANYWHERE
- CURATIO — We listen… innovate
- GoApptiv — Expertise In Health And Pharma Data Analytics
- vHealth by aetna
- Healthway Medical
- arc — International Fertility & Research Centre

Banking
- kotak — Kotak Mahindra Bank
- AXIS BANK
- Fino Fino Payments Bank
- IDFC FIRST Bank

Financial
- tazapay
- BANKIT बैंकइट
- HDFC
- atom
- AXIS MUTUAL FUND
- MOTILAL OSWAL — Investment Services
- AngelOne
- IIFL
- AXIS SECURITIES
- SMC — Moneywise. Be wise.

IT / ITES
- Availity
- CONNEQT — BUSINESS SOLUTIONS LIMITED
- UST
- accesshealthcare

Others
- D-VoiS Communications Pvt.Ltd.
- orientbell tiles
- hmda — Growing Global
- GOVERNMENT OF TELANGANA
- CITY OF BAGUIO — OFFICIAL SEAL
- EXCITEL
- Godrej
- UPL
- Nanhi Kali — for the girl child
- Heineken
- WAAREE — One with the Sun
- alpharooms

Engagely.ai: AUTOMATION TO ENGAGEMENT WITH AI

Improved Customer Satisfaction

Higher Revenue

Reduced Cost

Efficiency Improvement

Prospect Engagement

Customer Engagement

Internal Stakeholder Engagement

AI that uncovers customer intents real time by analyzing conversational data, Customer Behavior, click stream, 2nd Party and 3rd Party data and act on this to engage in real time

Omnichannel conversation automation

Business Impact

Personalized Engagements

Engagement AI

Conversational Automation

ONE ORGANIZATION, ONE PLATFORM.

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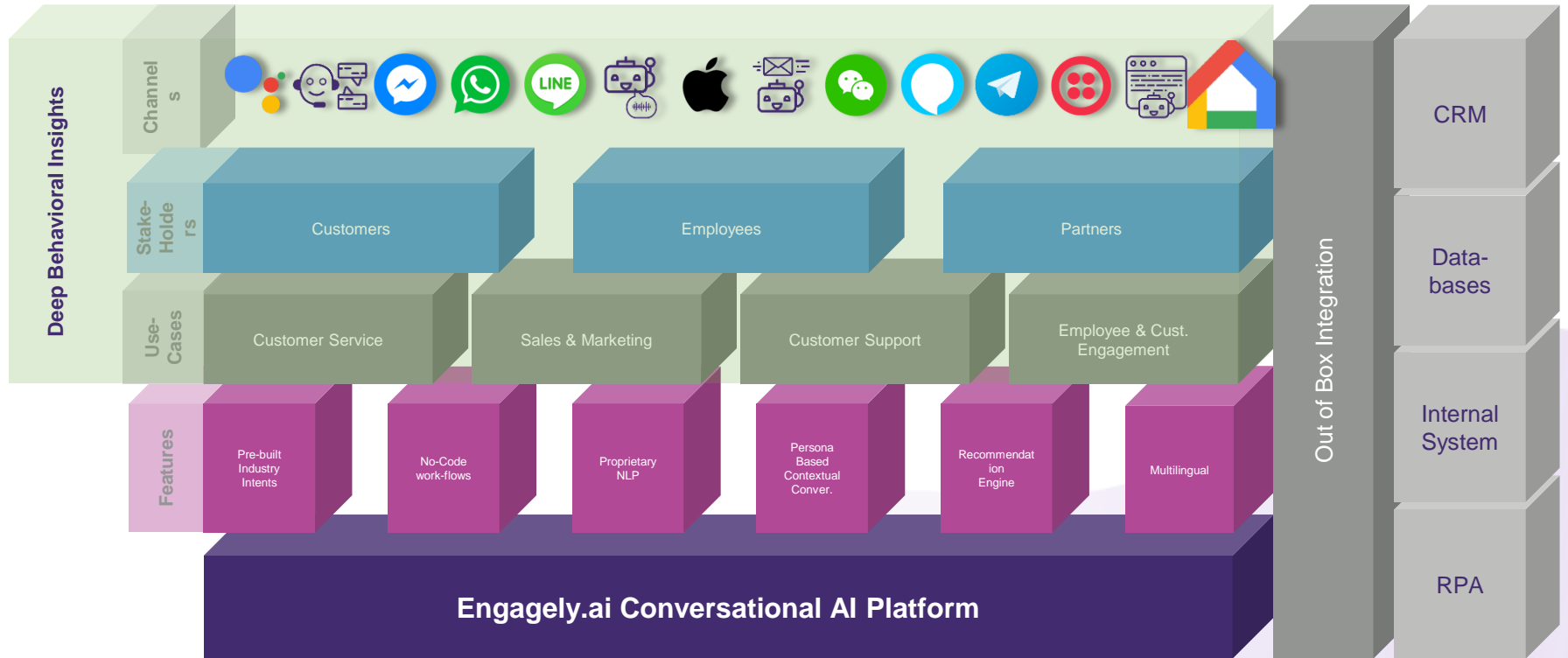
TRANSFORMATION OF BRAND COMMUNICATION
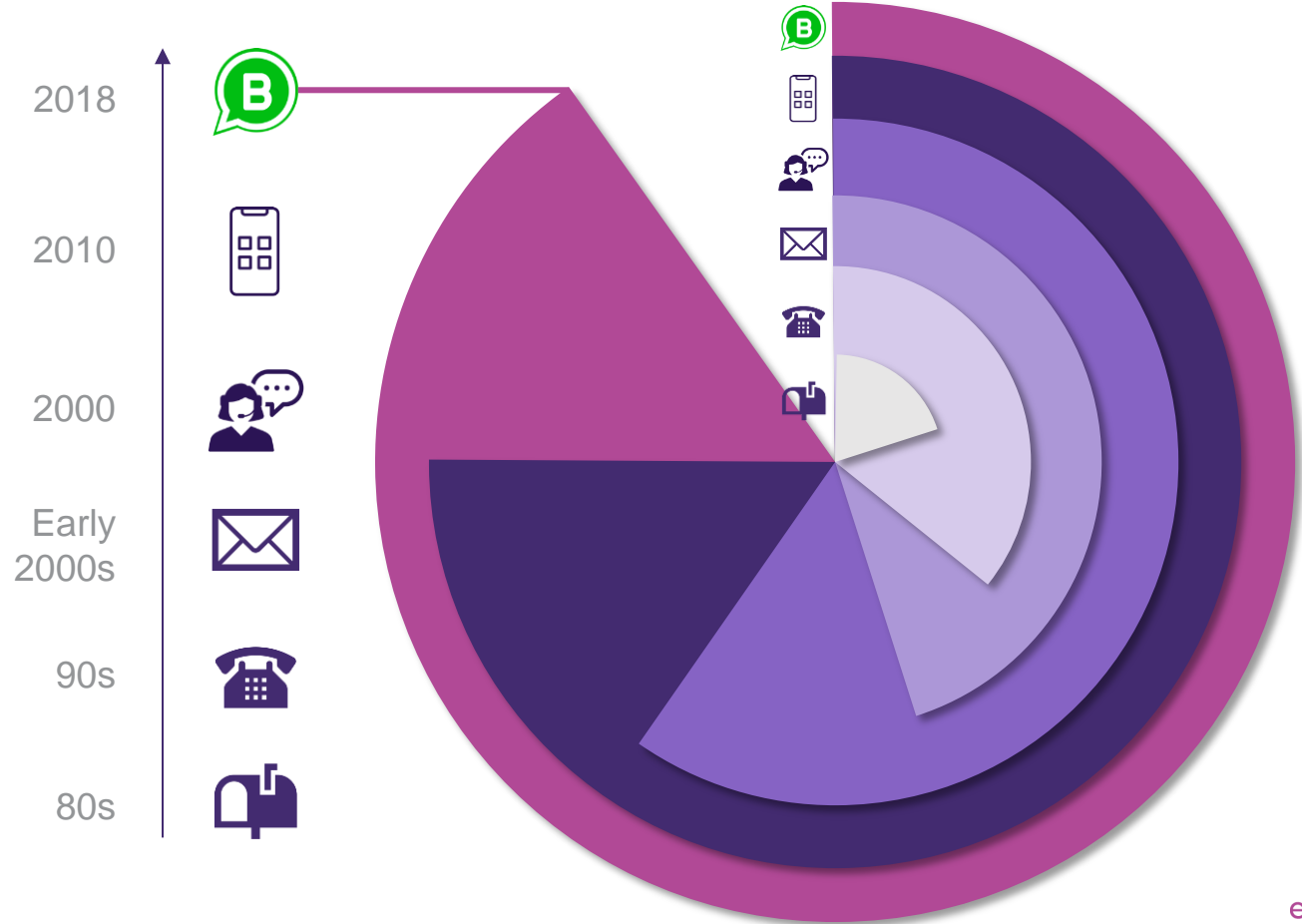
Communication with customers has not just been **automated** to a very large extend over the time but **Customer Engagement** has also been improved drastically.

2018

2010

2000

Early 2000s

90s

80s

WHY **WHATSAPP** BUSINESS?

2 Billion+
WhatsApp Users
Globally

$3 Million+
Sales Generated
Using WhatsApp

5 Million+
Businesses use
WhatsApp Business

1.6 Billion
Active Monthly
Users Globally

Available in
180 Countries
& 60 Different
languages

Coming Soon
WhatsApp Pay

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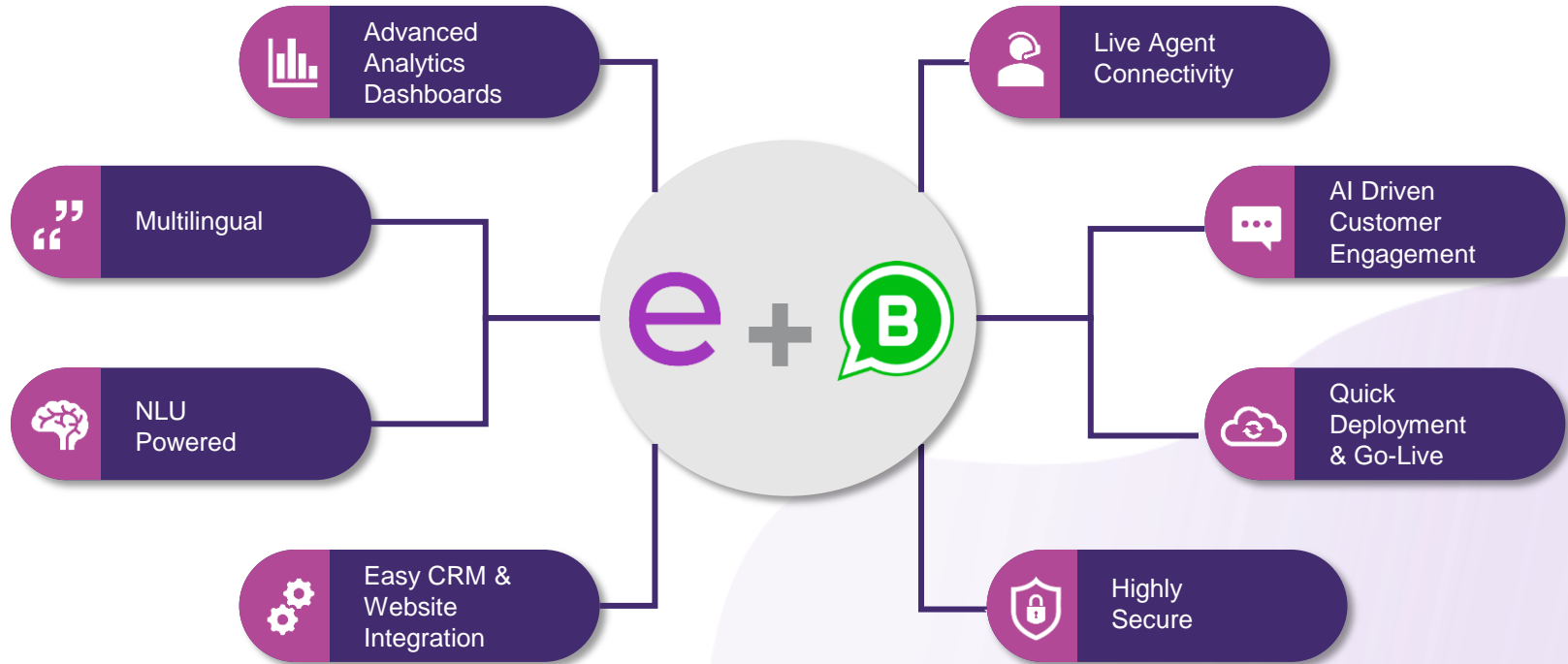
BENEFITS OF Engagely's WHATSAPP AI

Improved Revenue

Up-sell and Cross sell using conversations & recommendations to increase top line number

Higher Reach

Possibly reach each of your customer who uses WhatsApp

Reduce Cost

Handle multiple requests at once.

Improve Customer Experience

Use Maps, images, videos, & other multimedia messages

Better Customer Satisfaction

Learn from previous conversations & give accurate responses

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SUPPORTS MULTIMEDIA MESSAGES

Leverage Multimedia support of WhatsApp Business for increasing customer engagement

Images/Videos

Customers engage better with image & video content. Increase your engagement with multimedia messages on WhatsApp

Documents

Share PDF and Docs format documents to your customers.

Maps

Share and get locations to and from your customers

Audio

Customers are preferring voice over texts, leverage WhatsApp's audio messaging capability

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ACQUIRE. ENGAGE. SUPPORT.

Improve Lead Generation by enabling direct opt-in using **WhatsApp**
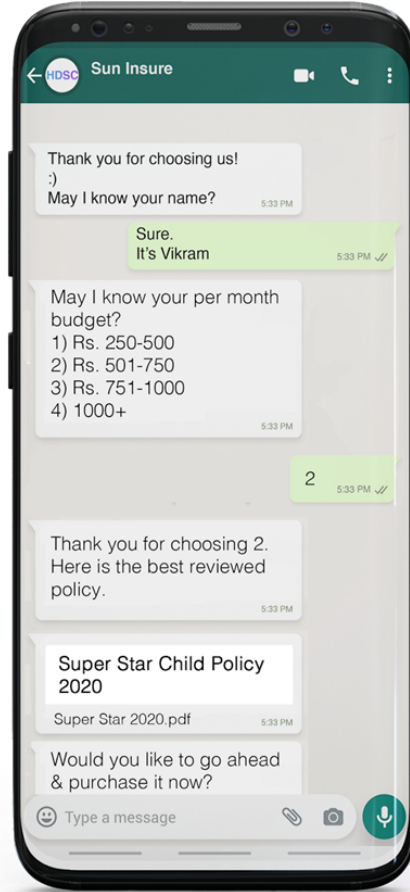
Generate Leads using Contact Number with double opt-in & use contextual welcome message to improve customer engagement

Benefits

Quick Qualification

Better Engagement

Quality Lead Gen

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ACQUIRE. ENGAGE. SUPPORT.

Engage better with your customers by helping them with reminders and updates. Use multimedia to engage audience better.
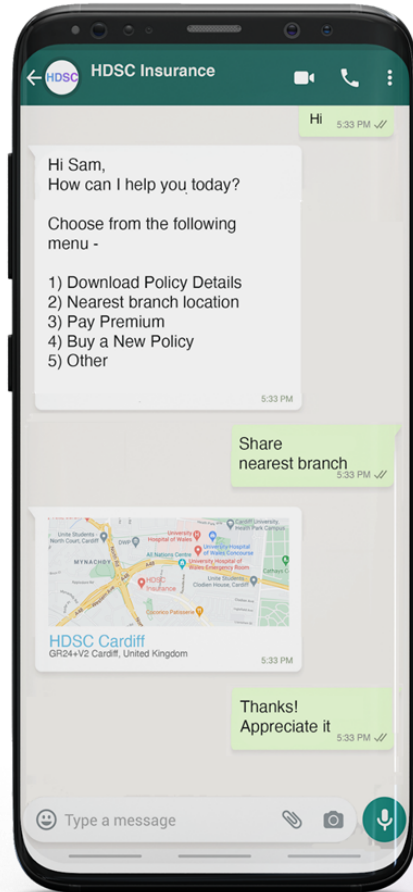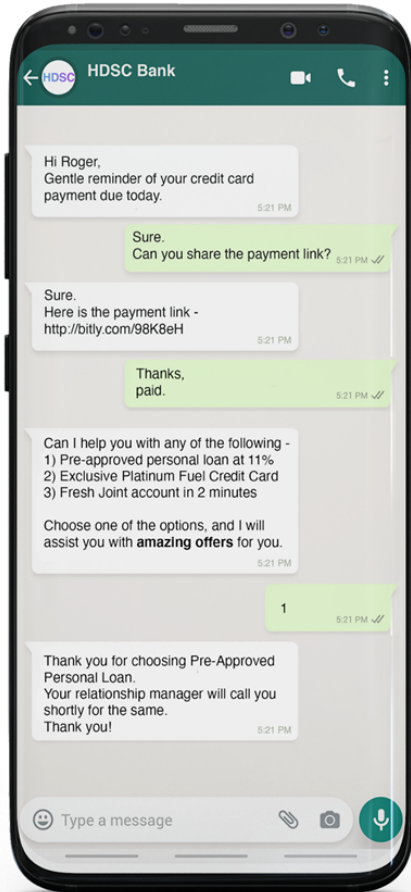
Stay in touch with your Customers on their preferred Messaging App. Upcoming WhatsApp Pay feature to make payments easier

Benefits

★★★ **Improve NPS & CSAT**

Reduce Customer Churn

Increase Loyalty

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ACQUIRE. ENGAGE. SUPPORT.
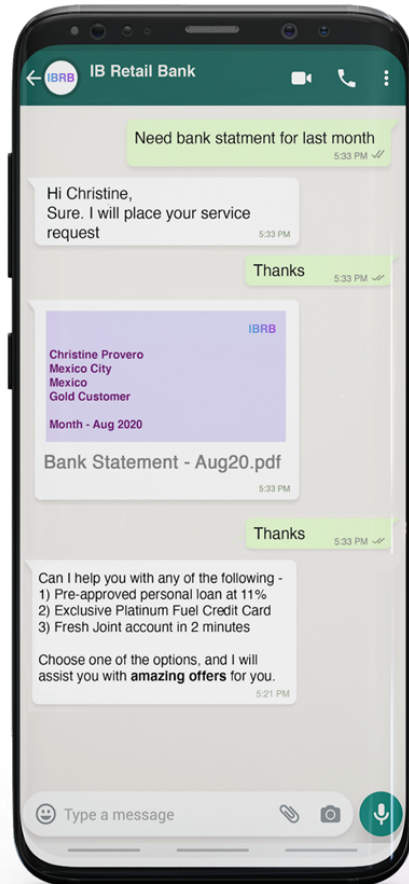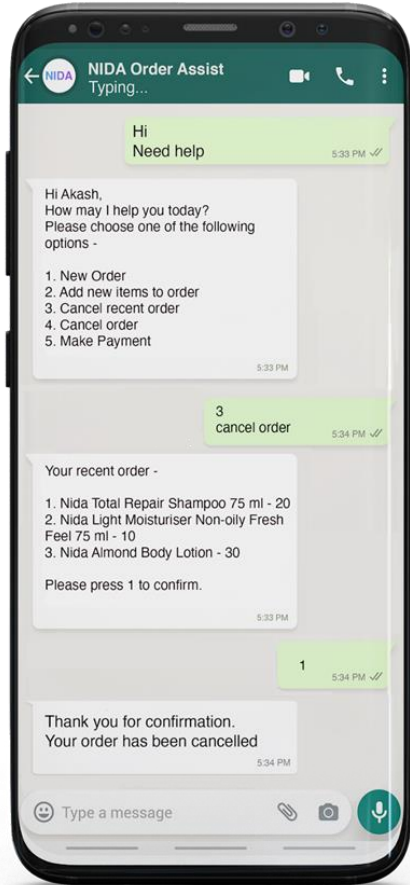
Automated response to customers' queries on WhatsApp. Connect to Live agent if required. ML engine in the backend to continuously train the support bot

Benefits

 Quick Turn Around time

 Resolve at first go

 Continuous Learning

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MULTILINGUAL SUPPORT
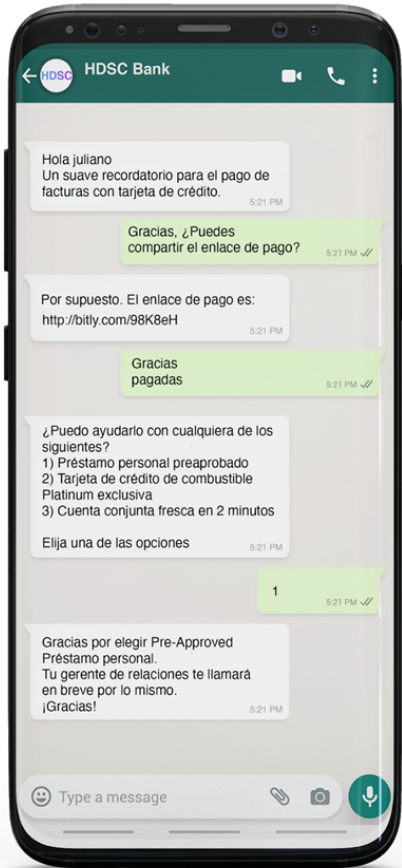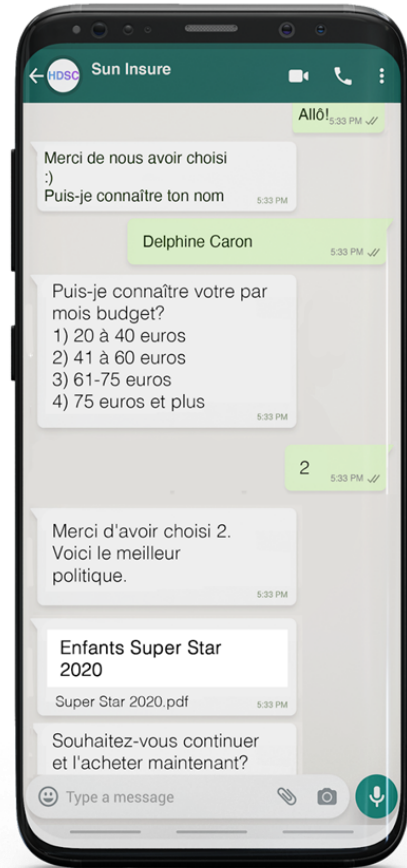
- Increase your customer reach & deliver an excellent customer engagement with Multilingual WhatsApp bots.

- 100+ Languages

- Powered with NLU

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FOCUS ON CUSTOMER ENGAGEMENT

Engagely's WhatsApp Bot enables Contextual Conversations, Context Handling & Interruption handling to facilitate top-notch **Customer Engagement**
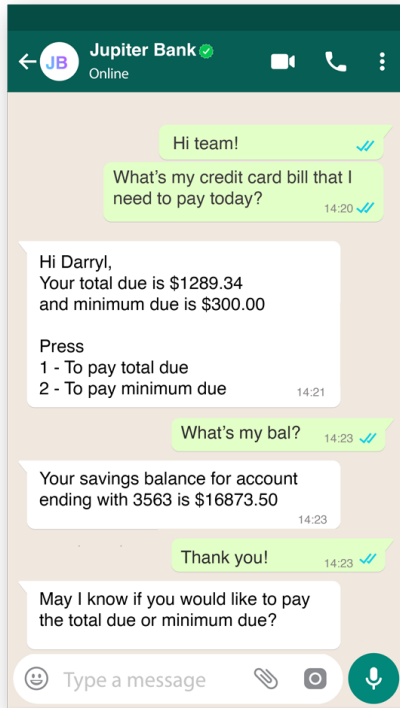
Contextual Conversations

Understand the context through conversations to perform **up-sell** & **cross-sell** operations thus driving higher revenue for you.

Context Management

Switch the context seamlessly if the customer diverts from the current topic and switches to another. **Park** and come back to the context that was left unattended during the conversation due to switch in context.

Interruption Handling

The bot is functioned to handle the **interruptions** made by users without breaking the flow.

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INTENT BASED RECOMMENDATIONS

Leverage **intent identification** capabilities to give best recommendations

Use it to upsell & cross sell products

and increase sales

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WHAT CAN YOU DO WITH WHATSAPP AI?

- Allow user to double opt-in using QR code to start conversation

- Initiate **call based on a trigger** in CRM

- **Integrate with CRM** & build personalized conversation

- Automate **FAQs**

- Fetch & share info from database

- Book **Orders**

- Update the information in CRM based on user input

- **Book an appointment**

- **Share Map links, Documents, Images, Videos**

- Handover to **human agent**

- **Recommend appropriate products to upsell and cross sell**

- Male **Payments**

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WHAT IF THE BOT RUNS OUT OF ANSWERS?
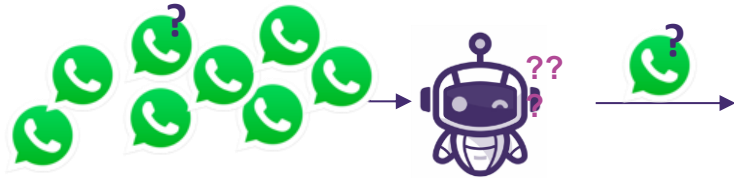
- Smooth **transition** between Bot and Human Agent
- **Up-sell & Cross-sell** Recommendations
- **Multiple conversations** handled at concurrently

1 New Message

Cust. Name: Samson Fernandes
Cust. ID: IXE239 Issue ID:239022
Issue: Wire transfer failure since 3 days
Amount impacted – ($788.23)
Sentiment Detected– Negative
Emotion Detected – Angry

Smart Recommendations

Agent:
I am glad I could resolve your issue

User: thanks for your help.

Recommendation Alert – Travel Credit Card – X0293

Agent:
No problem.
Is there anything else I could help with?
We have good a good offer on Travel Credit card.

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LIVE AGENT SCREEN

Jane Parish
12:02:02

LIVE WHATSAPP CHAT

Call started at Thursday 19th Sept 2019 03:00 pm

I want to reset my password.

03:00 pm

To reset your password, go to the password reset page and follow the instructions

03:00 pm

2 New Messages

B *I* U 🔗

Type here

AGENT BOT

Hello Agent! How may I help?

03:00 pm

How can a user reset password?

03:00 pm

Type here

Customer's Information

👤 John Doe   ✉ johndoe@gmail.com

🖥 172.17.1.1   📍 Mumbai, India

🔗 Sentiment   ❓ Last ticket/query

⭐ RECOMMENDATIONS

▶ Recommend Diwali offer to this customer

▶ Recommend Diwali offer to this customer

⏱ PREVIOUS HISTORY

Chat started Thurs 19th Sept 2019 03:00 pm
Reset my password

Chat started Thurs 19th Sept 2019 03:00 pm
Forgot Password

Chat started Thurs 19th Sept 2019 03:00 pm
Book Order

Chat started Thurs 19th Sept 2019 03:00 pm
Return Order

Chat started Thurs 19th Sept 2019 03:00 pm
Exchange Order

Dialer

Chats

Email

Logout

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FUNCTIONAL USE CASES

Lead
Gen

- Generate double opt-in high quality leads
- Conversation based flow
- CRM Integration

Customer
Support

- Quick & Accurate response
- Right in the first go
- Live Agent connectivity
- Improved agent productivity

Up-Sell
Cross Sell

- Increase Revenue
- Target right products/services based on the conversations and customer profiles

Customer
Feedback

- Take customer feedback over whatsApp
- Improve customer satisfaction

Notifications
& Reminders

- Send message based on CRM Triggers
- Send reminders & notifications automatically
- Payment reminders

Make
Payments

- Whatsapp Payments to be introduced soon
- Making payment is as simple as sending a message on whatsapp

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USE CASES BY DOMAINS

Banking

Customer Support
Account opening
Credit Card Purchase
Bill Payments
Money Transfer

Insurance

Automated Claims Filing
Lead Generation
Up-sell Cross-sell
Policy Recommendation
Payments

E-Commerce

Customer Support
Lead Generation
Product Discovery
Customer Service

Healthcare

Improve patient outcome
Book appointments
Pay bills
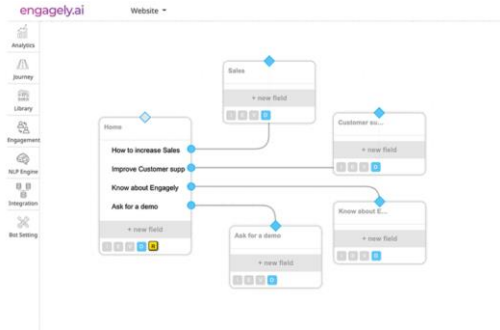Check symptoms online
Download reports
Inventory updates

Telecom

Automated Support
Online Service
Bill payment
Promotion Launches

& many more customized use cases

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EASY IMPLEMENTATION & DEPLOYMENT

Easy Creation with No-Code Platform

Using our no code drag-drop create bots in less than 15 mins

Seamless Integration with your Enterprise Eco-system

Integrate with all major CRMs, and other software using API

Deployment as Per your preference

Can be deployed on cloud, on-prem or on a hybrid system, depending on your preferences

Cloud   On-Prem   Hybrid

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WHY **Engagely.ai**

Passionate Team

- Highly Experienced & skilled team
- Most of the talent comes from Top-Institutes like ISB, IIT, BITs

Banking Grade Security

- 256-bit Encryption
- GDPR Compliant
- Private Cloud Option
- Version Management & Audit Trails
- Private Cloud Option
- Quarterly VAPT audits by 3rd party

Lightning Fast GoLive

- Create bots in minutes
- GoLive in a week's time

Customer Success Approach

- Dedicated team to focus on Customer Success
- Ensuring customers achieve their goals

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APPENDIX

CASE STUDY ENHANCED CUSTOMER ENGAGEMENT

The client is a leading InsurTech platform to purchase life and general insurance products. The client focuses on introducing and delivering value-based, innovative, and competitive solutions for their customers.

CHALLENGES

- Dropping levels of digital engagement
  > Higher Churn
- Prolonged website navigation to access required information
  > Low Customer Satisfaction
- Huge volumes of process-related queries
  > Customer support team's productivity

SOLUTION

WhatsApp bot – helped the client in delivering a smooth & round the clock availability service, on a channel which was easily accessible to their customers

Live Chat – In some cases a customer insists on talking to a live agent. Thus providing a live bot integration increased the customer experience and engagement drastically, and finding information became quick and easier.

BENEFITS

10%
Increase in sales through digital channels

50%
queries were automated

15%
increase in the Customer CSAT post-implementation

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ENGAGELY's NO-CODE BUILDER

WAYS TO OPT-IN

**CTA in between
the blogs, articles,
Or webpages**

**QR Scanners
at Retail outlets**

**By Sharing Link
Over Email, SMS**

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PHONE NUMBER & DISPLAY NAME

Engagely.ai will require a phone number and a display name associated with that phone number in order to use the WhatsApp Business API

PHONE NUMBER

WhatsApp Business API accounts rely on a valid phone number

- You must own this number

- This phone number (active) must be able to receive voice calls or SMS

- This phone number must also not have been used with the WhatsApp Business API before

- During the registration process, you will receive a 6-digit registration code on this number

- Read WhatsApp Policy

+1 (768) 888-8011
Business Account

Sun Bank
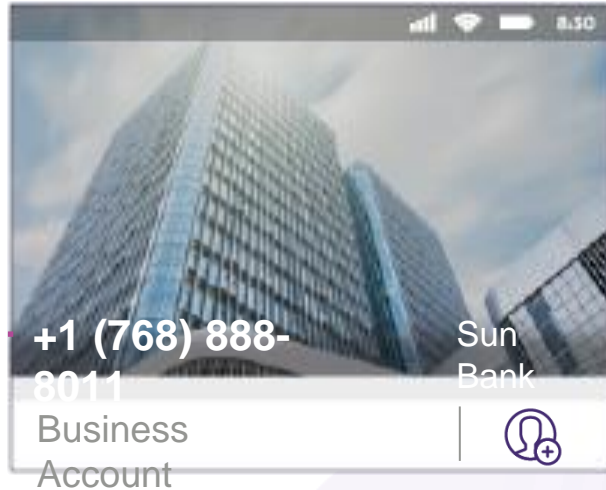
DISPLAY NAME

Every phone number is assigned a display name.

- Display names should have a relationship with your business

- Engagely.ai will assign a display name to your phone number and submit it for review by the WhatsApp team from the Business Manager

- Your display name will be rejected if there are formatting errors

- Read WhatsApp commerce policy

- Read WhatsApp Business policy

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Verified Account

There are two types of WhatsApp business accounts

Jupiter Bank ✓

Official Business Account

+1 (768) 888-8011   Jupiter Bank
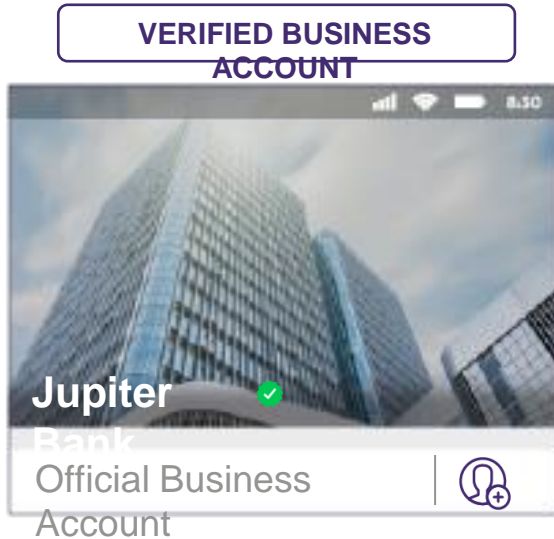
Business Account

- WhatsApp has verified that an authentic,
   notable brand owns this account.
- An official business account has a green
   checkmark badge in its profile and
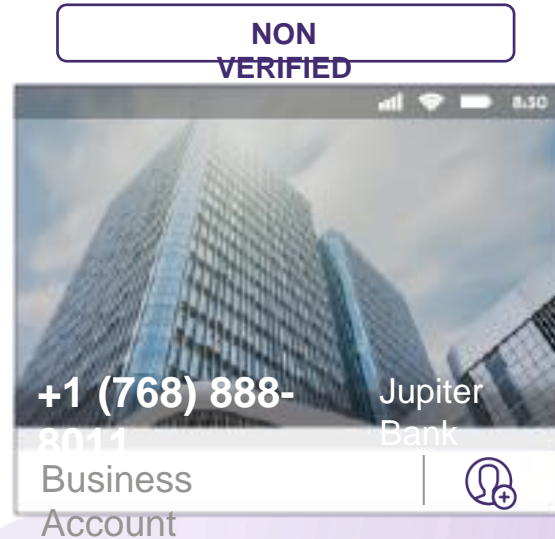
- By default, any account using the WhatsApp
   Business API or WhatsApp Business App
   is a business account.
- WhatsApp verifies authenticity of a

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OPT-IN REQUIREMENTS

In order to send a WhatsApp message to a person, the business must receive opt-in permission

WHATSAPP MANDATES

USER ACTION
Must be triggered by a customer action

EXPLICIT LANGUAGE
I agree to receive [noun], [logo and name], on [number]

VISUAL INDICATION
A visual element shown next to the WhatsApp name and logo

OPT-IN EXAMPLE

☐ Receive your purchase confirmation

Phone number

+1 (123) 456 7890

WhatsApp

HOW TO GET AN OPT-IN
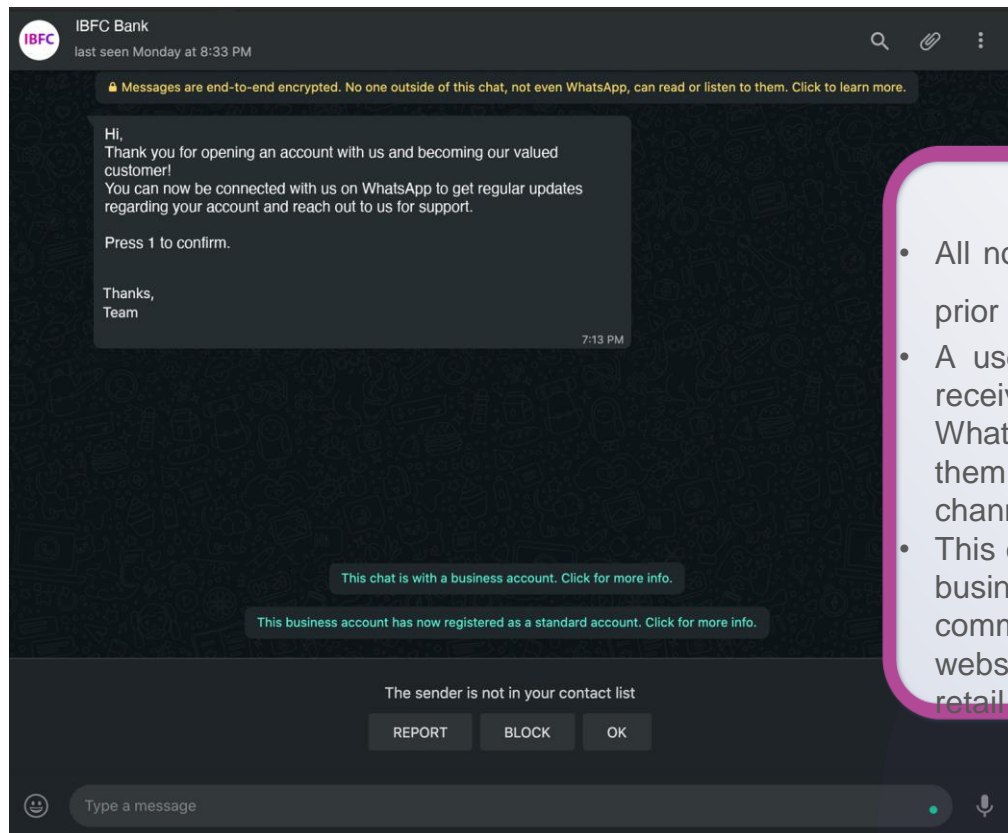
- All notifications/HSMs require prior customer opt-in.
- A user must first consent to receive messages on WhatsApp by opting into them via a third-party channel.
- This can be any channel your business uses to communicate with the user - website, app, email, SMS retail location, etc

During the online transaction process

While setting up user profile and preferences

Via email, SMS, or within mobile app

Via phone interactive Voice response (IVR)

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OPT-IN FAQs

1. If a customer reaches out to us for customer support, does that count as opt-in for other notifications?

- No. We encourage all businesses to use WhatsApp as a customer support channel, but if you are also using it to send notifications, you will need to get opt-in via a third-party channel for the notifications you plan to send.
- The exception here is notifications (message templates) that has the issue resolution type.
- Since these are part of the original customer support thread, a business can send notifications of this type outside of the 24-hour customer support window.

2. Can I use SMS, email, and other channels to get opt-in on WhatsApp?

- Yes. You can use any channel that you use today to reach your customers, but you must follow WhatsApp guidelines in order to get them to opt in.
- This means that there has to be a flow for a user to indicate the number and types of messages they want to receive on WhatsApp.
- An example would be sending an SMS that links to a form they can fill out to indicate that they want to receive messages on WhatsApp.

3. Can I use one checkbox to ask users to opt into receiving messages on WhatsApp or SMS?

- No. You must indicate WhatsApp as a separate option with the name and logo.

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OPT-IN FAQs

1. If the explicit action to type in a phone number happens in a previous step of the onboarding flow
   (particularly for new users), do I need to re-verify the number again?

- No. If there is a multi-step flow that users must complete where in that same flow a user has already verified their phone number, but the active opt-in for WhatsApp happens on the next screen or later in user onboarding, it's okay to not show the phone number again.

2. If a business promotes calling them on WhatsApp in order to collect a set of customer numbers, does this count as opt-in?

- In order for this to count as opt-in, a business would need to first create a flow (e.g., a form hosted on their website) that follows WhatsApp guidelines.

- The user must opt into receiving specific types of messages on WhatsApp and understand that by calling a number that is what they are doing.

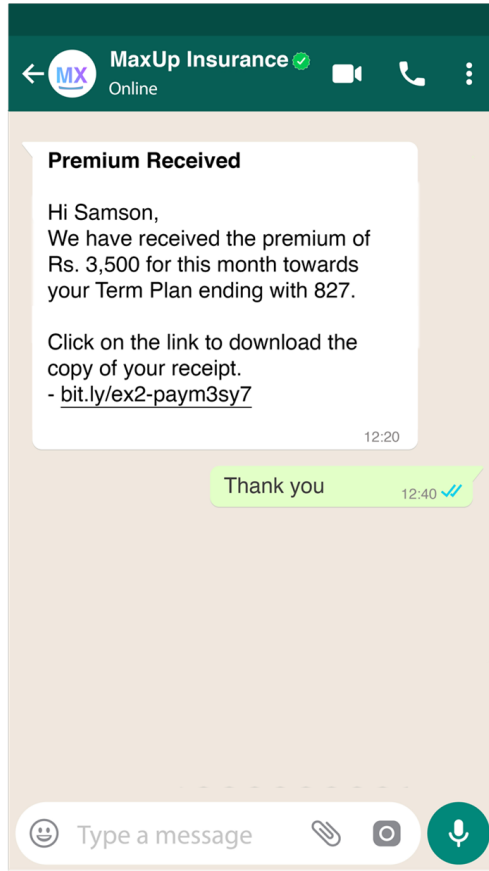**3. Is WhatsApp checking if businesses are following the rules?**

Yes, they are! WhatsApp conducts routine checks on opt-in flows as well as monitors quality signals (e.g. if too many people start blocking you, you might be up for a review

SAMPLE SCREENSHOTS
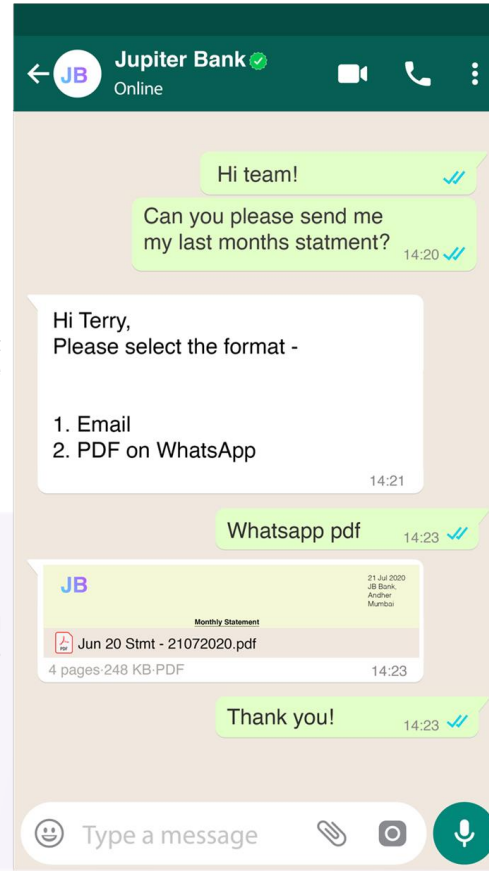
You can send textual notifications to your customers

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MaxUp Insurance ✓
Online

Premium Received

Hi Samson,
We have received the premium of Rs. 3,500 for this month towards your Term Plan ending with 827.

Click on the link to download the copy of your receipt.
- bit.ly/ex2-paym3sy7

12:20

Thank you   12:40 ✓✓

Customized Contextual Messages

Instant text-based notifications

Type a message

Jupiter Bank ✓
Online

Hi team! ✓✓

Can you please send me my last months statment?   14:20 ✓✓

Hi Terry,
Please select the format -

1. Email
2. PDF on WhatsApp

14:21

Whatsapp pdf   14:23

JB   21 Jul 2020
                                          JB Bank,
                                          Andher
                                          Mumbai

                        Monthly Statement

📄 Jun 20 Stmt - 21072020.pdf

4 pages·248 KB·PDF   14:23

Thank you!   14:23 ✓✓

No wait time

Conversational Intent Identification

Multimedia based messages

Type a message

ACTION BASED MESSAGES

Message templates that can be used with customized call to action buttons & quick replies.

CALL TO ACTION - BUTTONS

- • You can add **two call-to-action buttons**
- • WhatsApp allows the following types of call-to-action buttons:
  - a. Visit website objective
  - b. Call phone number

Thank you for your request. You will hear back from our agent in an hour.

📞 Call Support

🖱 Visit Site

QUICK REPLIES

- • You can add **three quick reply buttons** to message templates.
- • These quick reply buttons will help you improve the quality of conversations with users by prompting responses that can reduce spelling errors

Have you received the invoice for last month?

6:30 pm

| Yes, I have | No, I haven't |

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NOTIFICATIONS THAT ARE NOT ALLOWED

WhatsApp approves every notification template associated with the WhatsApp account.
WhatsApp will not approve the following types of notifications.

UNPERMITTED NOTIFICATIONS

- Sales, discounts, promotions, product recommendations or offers
- Recurring content
- Customer re-engagement.
- Product or marketing/brand surveys
- Businesses asking customers to review their app
- Businesses asking a customer to share notifications with multiple customers
- Businesses that send reminders or alerts that a customer may have indicated interest in seeing (not related to a purchase or event)

Merci

ನನ್ದಿ

감사합니다

Cảm ơn bạn

آپکا شکریہ

ಧನ್ಯವಾದಗಳು
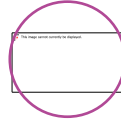
धन्यवाद

Vielen Dank

Thank You!

شكرًا لك

ขอบคุณ

நன்றி

ありがとうございました

謝謝。

Obrigado

India Singapore UK UAE

Спасибо

Bonjour

Terima kasih

Follow us on -

Gracias

ধন্যবাদ