



CX24

AUTHENTIC ROOTS. AMBITIOUS PURSUITS.

CSI

ENHANCING YOUR

DIGITAL BANKING

SUPPORT



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AGENDA

01 - Overview

02 - LinkLive Offering

03 - Utilizing Chat

04 - CSI Digital Customer Support

05 - Follow Up and Q&A

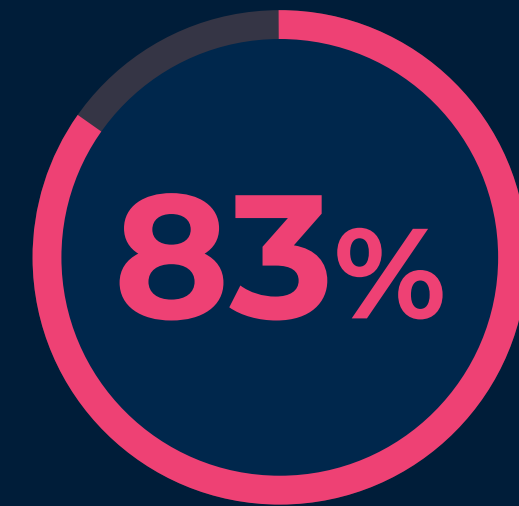
WHY GREAT CUSTOMER SUPPORT IS IMPORTANT



Good customer service turns one-time clients into long-term brand champions.
(Khoros)



Of customers are likely to make repeat purchases with companies who offer excellent customer service.
(HubSpot Research)



Of customers agree that they feel more loyal to brands that respond and resolve their complaints.
(Khoros)

PROVIDING GREAT CUSTOMER SERVICE

- It starts with people
- Reach your customers where they are
 - Online, in-person and on the phone
 - Give options
- Make it easy for customers to communicate

WHAT SUPPORT IS AVAILABLE FOR DIGITAL BANKING?

- Bank Customer Support for Digital Banking
- Chat in Digital Banking (LinkLive)
 - Supported by your Bank employee
- End Customer Support for Digital Banking and Bill Pay

LINKLIVE

The background features a repeating pattern of icons on a light blue background. Each icon consists of a white rounded square containing a black triangle with a white headset icon inside. The triangle is surrounded by a grey speech bubble, a yellow circle, and a blue circle. The icons are arranged in a staggered grid.

FUTUREPROOF YOUR COMMUNICATIONS

LinkLive can help you win in a very complex, confusing, misunderstood, nuanced and rapidly evolving market.

what was/is

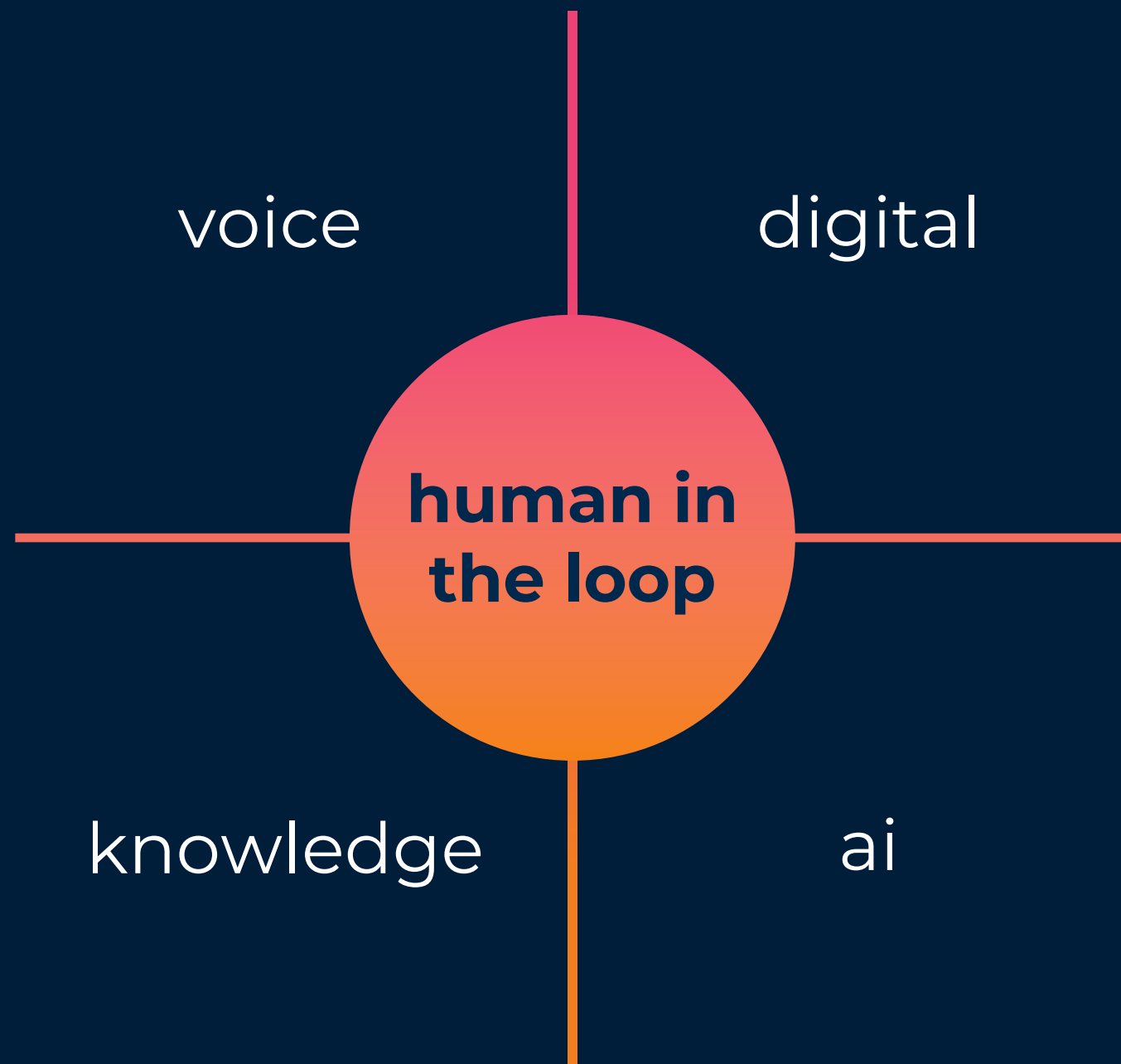


what could be

voice first
voice only
contact center
customer service experience

digital first
all channels
autonomous
customer engagement

what was/is



what could be



#1 DCS

by more than **1000**
financial institutions

LINKLIVE

CSI PARTNER

Integrated with
Digital Banking

COMMUNICATIONS

One preferred solution
across all channels



BE THERE FOR YOUR CUSTOMERS

Ingredients required for transformation



▶ **SECURITY MATTERS**

Security Emphasis with Messaging & Communications.

Advanced Session Management & Logging.

Compliance Monitors & Sweeper.

Rapid deployment & Implementation.



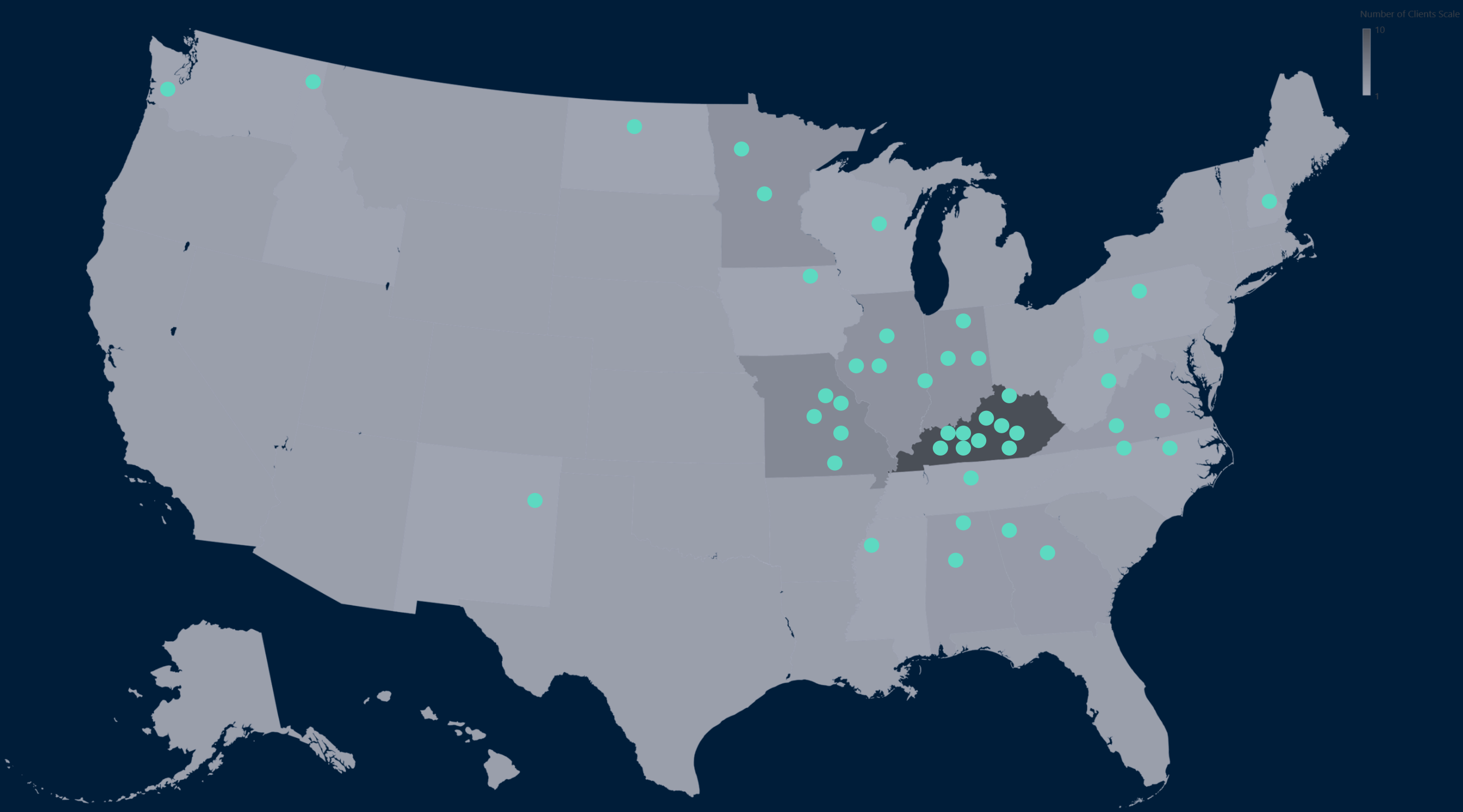
LINKLIVE



WHAT SHOULD YOU DO NEXT?

- Contact your CSI RM to opt-in for the LinkLive Embedded Services
- Leverage the following services at no additional cost:
 - Digital Banking Customer Service Chat
 - Desktop Share
 - Integrated within CSI Digital Banking

JOIN OTHER CSI CLIENTS ACROSS THE COUNTRY



LINKLIVE

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Essential

The essential services for engaging with your customers in a digital-first experience with your sales, service and support teams.



Premium

Premium services for faster & more cost-effective customer engagements across channels, call center employees and licensed professionals.



Premium +

Best Outcomes

The singular communications platform to future-proof communications across all channels, and all employees and licensed professionals.





STEVE SCHEXNAYDER

CHIEF INFORMATION OFFICER @
NEIGHBORS FEDERAL CREDIT UNION



Our goal was to consolidate as many [communication] capabilities as possible into one product and relationship. That's been a success.



80% of desk phones were eliminated with LinkLive streamlining our operations and cutting resources from supporting old tech.



LAURIE ASPINWELL

AVP SERVICE CENTER & DIGITAL BANKING
MANAGER @ NEWBURYPORT BANK



LinkLive's focus on innovation in contact center technology is exciting and we know that we can rely on them to help us continue to improve our digital customer service.



LinkLive stands out above the rest.

LINKLIVE





CRYSTAL JACKSON

SVP, DIRECTOR IT SERVICE DELIVERY
CONSUMER @ DIGITAL SOUTHSTATE BANK



Given our long history with LinkLive, it was an easy decision to select for digital customer service as we upgrade our digital banking as a result of a recent merger.



The LinkLive platform is critical in helping us achieve our transformation agenda.

LINKLIVE





Cayla Keyes

VP Retail Sales Manager @ INB



Your partnership with CSI was very important because they're our core provider.



Bringing together voice and digital conversations into one solution led to a 25% reduction in handle time required to engage in conversations from both channels. We saw the benefit of having both with the same vendor.



For More Information

Scan the QR code,
visit the **LinkLive Booth**,
or go to:

[Info.linklive.ai/csi_customer_site](https://info.linklive.ai/csi_customer_site)

CSI CUSTOMER
SUPPORT

BILL PAY SUPPORT CALLS & CHATS FOR BANK CUSTOMERS

Enrollment

- Enrolling in Bill Pay

Payees

- Adding a new payee
- Editing a payee
- Deleting a payee

Payments

- Add a new payment
- Edit/skip a payment
- Cancel a payment
- View a scheduled payment

Other

- Adding a new pay from account
- External transfers only through Bill Pay
- Stop pays

CSI Call Center

Customer Service

Provide your team with additional time to engage in a higher-level customer service touch point and focus on additional cross sale opportunities.

Increased Ability to Meet Demands

Gives you the ability to meet demands during busier times of the day or expand your bank's after-hours support.

Lower Operational Costs

Leverage CSI staffing and expert system knowledge to lower the cost of staffing for your call center.

CALL CENTER DIGITAL BANKING SUPPORT

Update Security
Questions

Change Username

Update Email Address

Self-Enrollment Help

OOBA Reset and Help

Password Reset

Unlocking User

Restore User if Deleted

Disable Access due to
Fraud/Compromise

Resend Invite Link

Whitelisting

Update Phone Number

Navigating the Website

Navigating the App

Entering Form
Information

Online Statements

Assist with Setup of
Mobile Deposits, P2P,
External Transfers



CALL CENTER PERSONAL BANKING AND CARDS SUPPORT

IRA Tax Forms Questions

Traveling Customer
Requests

Balance Inquires –
DDA/SAV/TDA

Transaction History
Questions

Overdraft Questions

Adding Post Restrictions
due to Fraud/Compromise

Telephone Initiated Funds
Transfers (Template Only)

Loan Payments/HELOC
Advances (Templates Only)

Loan Payment Inquires

Assist with Digital Card
Features

Cards – Restrict Only

Review of Denied Card
Transactions

Reset PIN Attempts

Activate New/Reissued
Cards

Card Sentry – CSI Risk
Management



CRM CONTACT MANAGER AND CASE/WORKFLOW

← John Smith

Interactions

↑ Done X Cancel

New Interaction

02/15/2023

Interaction Type

CSI Call Center

Account Activity/Balance

Description

Verified. John called in and requested a balance for account ending in 4567. Provided memo balance to customer.

Participants

John Smith

Manage Participants

Interaction Pinned

← John Smith

↑ Done X Cancel

02/15/2023

New Case

Case Management

Title:

Category:

CSI Call Center

Fraud/Suspicious Activity

Origin:

Priority:

Normal

Associate Group:

Search here

Assigned to:

Search here Me

Description:

Verified. Customer would like a call back about a fraud charge on card ending in 1234 in the amount of \$52.36. Transaction was on 02/10/23 to Walmart. Customers card was restricted.

Attachments

CALL CENTER HOURS

Full Support

Monday-Friday
7:00 a.m. to 1:00 a.m. CST
Saturday
7:00 a.m. to 2:00 p.m. CST
*FED Holidays Not Included

After Hours Support

Monday-Friday
4:00 p.m. to 1:00 a.m. CST or
Monday-Friday
7:00 a.m. to 5:00 p.m. CST
Saturday
7:00 a.m. to 2:00 p.m. CST
*FED Holidays Not Included

Overflow Support

*Tailored to fit individual bank's needs



Digital Banking Support

Digital Banking Product

Live calls and tickets entered
through the portal

Digital Banking Product Reviews



DIGITAL BANKING FEATURES

ACH

OOBA

eStatements

P2P

EOY Tax Forms

Wires

Password Breach

Text Banking

Self-Enrollment

Allow

Positive Pay

Fraud Anomaly

Locations/Block

Detection

Locations

Mobile Remote

Premium Reporting

Deposit Capture

PFM

Card Products



DIGITAL BANKING PRODUCT REVIEWS

- Examine Banks Current Features
 - Updated Feature Options for Bank
 - Implementation Process for New Features
 - Fees for New Features
- Questions Regarding Existing Features

CONTACT US

Live Calls

Speak with Digital Banking Support via phone

Live support is available from 7:00 a.m. - 8:00 p.m. CT

Portal

Utilize the CSI Customer Portal to submit tickets

Attach all supporting documentation and data so support can examine the case

Support will update the case and set to Ready for Review

Reopen Cases

Bank requires additional assistance from support

Reasons for Reopen:
Additional Questions
Quality – Software/Product
Quality – Support
Response

After case is reopened one time, support will call back



TAKEAWAYS

- Demo Hub & eLearning
 - [Fintexperts Demo Hub | CSI \(csiweb.com\)](https://csiweb.com)
 - [Learning Hub](#)
- Talk to your RM or BDD for more information about these products or to get started.

Q&A

THANK YOU!



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