

Agentic Al for bankers

Unlock premium customer service with elevated conversations and amplified expertise





Are manual processes interfering with your customer service?

Bankers face a number of challenges in opening accounts for customers and delivering seamless service. Time-consuming processes such as note-taking, form validation and data entry take focus away from customers. A lack of visibility across data can lead to missed opportunities and lost revenue. Customers are often unfamiliar with complex

compliance tasks, leading to misaligned expectations, delays, and frustration. These issues delay onboarding and distract bankers from building relationships, creating personalized financial solutions, and driving long-term growth for their clients.



What if your banker could have a personal assistant in every meeting?

Enhance customer experience with FIS

Our first agentic Al experience leverages advanced technology to ease the burden of manual tasks, allowing bankers to devote their full attention to engaging with customers and building relationships.

It's technology that supports the human touch rather than replacing it.

Bankers become more productive while customers enjoy a smoother, faster process with more personal attention.



The agentic AI difference

Our first agentic AI experience is a voice-powered, real-time meeting assistant designed specifically for bankers. It serves as a "co-pilot" during meetings, starting the moment they sit down with their customer. The technology passively listens (with consent) to the conversation, instantly transcribes it and gives on-the-fly support. Integrated with FIS core systems, it reduces manual entry, ensures compliance and allows bankers to focus more on building relationships.

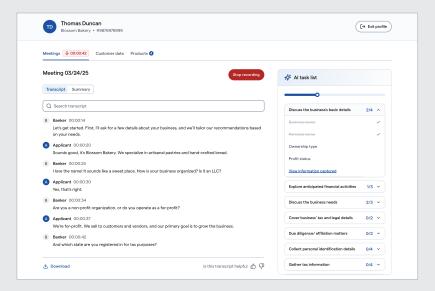
The key is its range of specialized AI agents that each perform a specific task during the process. Compliance and security are built in from the start, and control is always with the banker.

Unlock banker potential with a series of AI assistants working in harmony

| Agent | Key functions |
|-------------------------|--|
| Real-time transcription | Securely captures every word in real time, providing bankers with accurate, searchable conversation records. No more manual note-taking – 100% of relationship details are captured so nothing is missed, while bankers stay focused on the customer. |
| Prompt & data capture | Provides smart prompts to guide rapport-building and discovery questions based on the conversation as well as tasks prompts that track incomplete items and guide follow-up actions. Key data elements are captured and color-coded by confidence level so bankers can quickly validate and edit for accuracy while keeping control. Auto-populates fields in the core banking system upon submission. |
| Summary & action items | Auto-tracks conversations to provide a post-meeting analysis summary outlining key action items, follow-ups and referrals to cross-sell opportunities aligned with customer goals. This provides immediate guidance to the banker as well the ability to copy this information into your centralized CRM. |
| Product recommendation | Analyzes the conversation, the customer profile and unique customer needs to surface personalized products that are hyper-tailored to the customer. The banker can initiate the deposit origination workflows after selecting relevant products. Boosts cross-selling with timely reminders to recommend products at appropriate moments in the customer lifecycle. |
| Meeting sentiment | Analyzes meetings to gauge the overall mood of the meeting, offering insights into customer satisfaction and areas for improvement. |

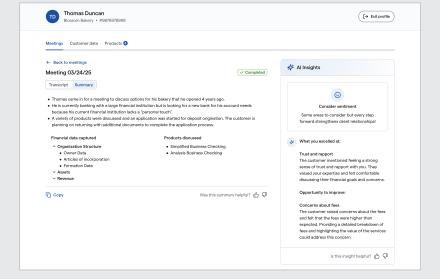


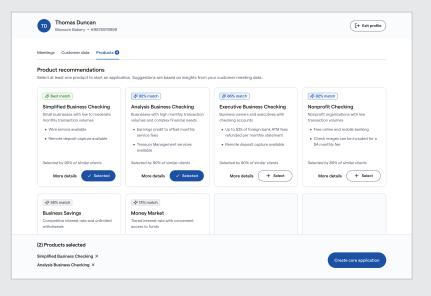
Agents in action



The prompt agent reminds the banker of questions to ask, checking off the data points automatically once captured.

The Summary agent transforms the conversation into a clear summary, actionable next steps and a detailed list of customer needs. Meanwhile, the Meeting Sentiment agent gives insights into how the customer feels, highlighting areas to improve their experience.





The Product Recommendation agent correlates the customer's data and recent conversations to recommend products tailored to their unique needs.



Empowering bankers to deliver greater value to customers

This is not a generic Al solution. FIS designed this agentic Al specifically for bankers as a support tool that enables better human interaction, improved efficiency and increased productivity.

How it helps the banker:

- Reduces administrative burden and cognitive load (no need to scribble notes or remember every detail)
- Enables greater customer engagement, active listening and rapport building
- Elevates individual performance by providing bestpractice prompts and thorough follow-ups
- Allows bankers to serve more customers and close more deals per day since less time is spent on after-meeting wrap-up
- Helps drive revenue through wider visibility across customer data with timely, relevant product recommendations and fewer missed opportunities

What the customer experiences:

- Smoother, more personalized service
- Natural flow of meeting without long banker pauses
- Greater sense that banker understands their needs though banker's ability to recall "everything," personalized interactions and relevant recommendations
- Faster fulfillment, providing immediate gratification
- Consistency with important details acknowledged and acted upon, leading to higher satisfaction and trust



Want to learn more?

Our agentic AI experience combines FIS® domain expertise with the power of AI. Unlock possibilities never before imagined and embrace a new paradigm of work that will fuel growth, reduce costs and architect a banking experience built for the future. Contact us today to learn how.

UNLOCK MORE

FIS core banking solutions manage money efficiently and securely.

Our technology powers the global economy across the money lifecycle.



Money at rest

Unlock seamless integration and human-centric digital experiences while ensuring efficiency, stability, and compliance as your business grows.



Money in motion

Unlock liquidity and flow of funds by synchronizing transactions, payment systems, and financial networks without compromising speed or security.



$\{\S\}$ Money at work

Unlock a cohesive financial ecosystem and insights for strategic decisions to expand operations while optimizing performance.

About FIS

FIS is a financial technology company providing solutions to financial institutions, businesses and developers. We unlock financial technology that underpins the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our clients confidently run, grow and protect their businesses. Our expertise comes from decades of experience helping financial institutions and businesses adapt to meet the needs of their customers by harnessing the power that comes when reliability meets innovation in financial technology. Headquartered in Jacksonville, Florida, FIS is a member of the Fortune 500° and the Standard & Poor's 500° Index. To learn more, visit FISglobal.com. Follow FIS on LinkedIn, Facebook and X (@FISglobal).





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