

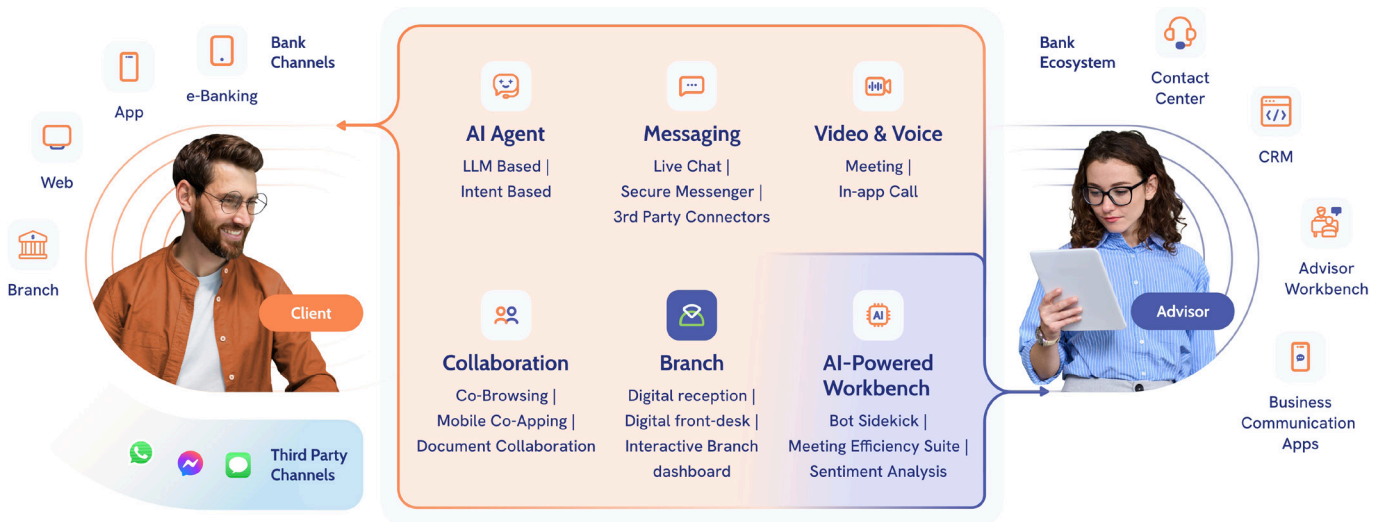


# Customer Service & Support

Transforming Digital Support Journeys



## Our platform



- High-tech **digital interaction technology** for the financial industry
- Offices in Basel, New York, Toronto, London, Frankfurt, Barcelona and Sofia
- Founded in Switzerland in 2008
- Certifications include: SOC 2 Type I & II & ISO27001
- 170+ customers in the financial industry worldwide
- Part of the Swiss Post Group since November 2022



# 01

## Where digital efficiency meets human connection

Unblu empowers banks to deliver fast, human, and compliant service experiences by connecting customers, bots, and agents in one secure environment.

The customer journey evolves through four connected phases – from first contact to issue resolution.

## 01 Requesting Support

Customers expect instant, accurate help - but traditional phone or email channels are slow and impersonal. Unblu's AI Agent provides **immediate, contextual responses** on both public and authenticated channels.

### → AI Agent

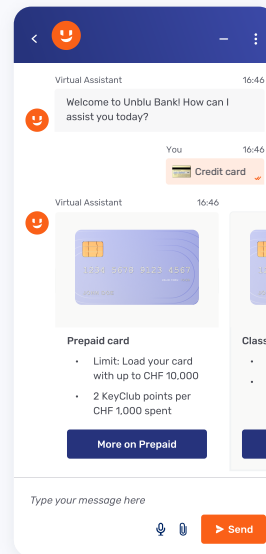
24/7 assistance, handling common inquiries, guides users through processes, and escalates seamlessly to human agents when appropriate.

### → Smart routing

Intelligently directs inquiries to the right department or human agent.

### → Omnichannel access

Embedded on the public site, mobile app, or messaging connectors (e.g., WhatsApp).



### Customer experience

Instant, effortless, and accurate support at any time - no waiting lines required.

## 02 Escalate to Human Support

When issues become complex, customers often need to repeat themselves when moving from a chatbot to a human agent. Unblu ensures a **seamless escalation from AI to live agents** - preserving conversation history and compliance at every step.

### → Instant, multilingual support

Real-time, secure chat with live translation in 30+ languages for fast, personalized client assistance.

### → Bot Sidekick

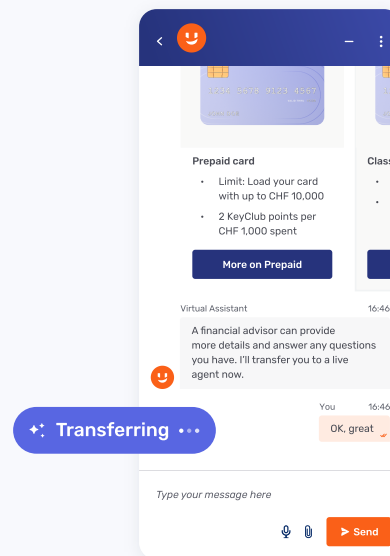
Automates triage and guides agents with smart suggestions for faster, more accurate customer experience.

### → Secure Messenger continuity

Enables ongoing, asynchronous conversations embedded in e-banking or mobile apps.

### → Compliant omnichannel messaging

Integrated with WhatsApp and SMS, maintaining full audit trails and data security.



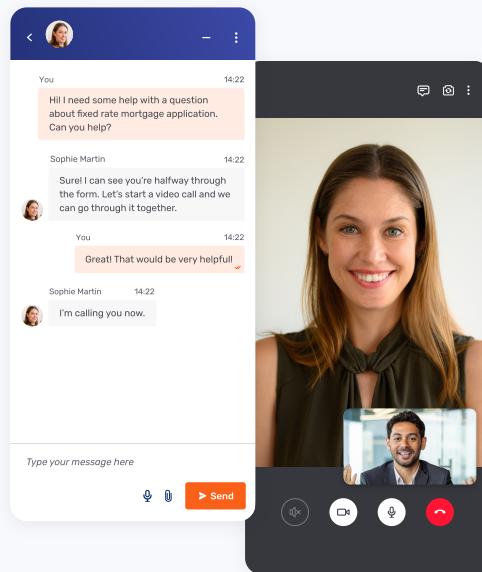
### Customer experience

Fast access to a live agent - enabling empathetic, human support while ensuring compliance and auditability.

## 03 Video & Voice Assistance

Some service requests require deeper, more personal interaction than text chat alone can provide. Unblu enables **compliant escalation from Live Chat to Video & Voice**, connecting customers to agents without losing context.

- **Instant chat-to-call transitions**  
Move from messaging to Video & Voice with one tap.
- **Appointment scheduling**  
Let customers schedule calls directly from your website, mobile app, or via the AI Agent.
- **In-app calling**  
Native calling experience inside the banking app, complete with familiar notifications for ease of use.
- **Live translation and captions**  
Communicate clearly across languages.
- **Flexible recording options**  
Remain compliant with full records.



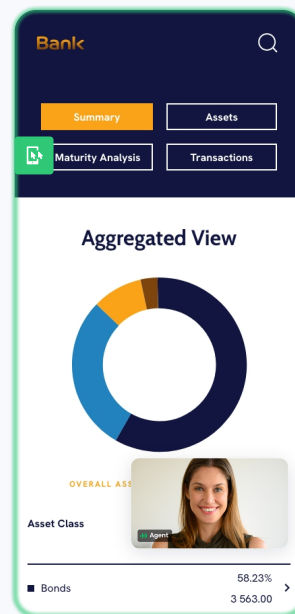
### Customer experience

Customers get immediate help through their preferred channel - text, voice, or video - all within one trusted conversation.

## 04 Collaborate, Resolve, and Convert

Customers often get stuck completing tasks online, while agents can't effectively guide them. Unblu transforms reactive service into **real-time, side-by-side collaboration**, empowering agents to **visually assist customers** and resolve issues faster - and take advantage of new upsell opportunities.

- **Co-Browsing**  
Agents guide customers through forms or troubleshooting steps directly on the banking portal or public website, no downloads required. Sensitive data are automatically masked to ensure full privacy and compliance.
- **Mobile Co-Apping**  
Extend the same visual guidance within the bank's mobile app for a seamless, on-the-go experience.
- **Document collaboration & e-Signature**  
Review, edit, and sign forms or agreements together securely.
- **Outbound messaging**  
Send secure follow-ups post resolution, offering product updates or personalized offers within chat.



### Customer experience

Clients feel guided and empowered as complex discussions become seamless and transparent - and are resolved more efficiently.

# 02

## Elevate the agent experience

High inquiry volumes, repetitive questions, and disconnected tools slow response times, create inconsistent service, and drive agent burnout.

Unblu streamlines the support experience into one intelligent workspace. Agents gain **automation and collaboration capabilities** to resolve issues faster, maintain compliance, and deliver **efficient, human service** at scale.

## Manage all customer interactions from a centralized platform

### Unblu Agent Desk

Support agents handle high volumes across disconnected tools, leading to slow responses, errors, and stress. Unblu unites every channel and workflow into one intelligent workspace, giving agents the tools and visibility to deliver fast, compliant, and personalized support.

#### → Unified inbox

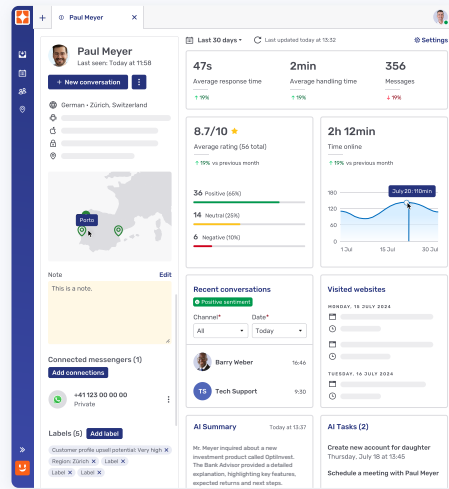
Manage all chat, voice, and video conversations – including those from third-party connectors like WhatsApp or SMS – in one interface.

#### → 360° customer view

Access full interaction history, shared documents, and notes.

#### → Conversation summary

Automatically generate concise summaries for quick review and handover.



#### → AI-powered assistance

Leverage existing databases and systems to surface relevant information, suggest responses, and support faster resolution.

#### → Hidden/visible participants

Bring in specialists or supervisors discreetly for real-time support, escalation, or compliance oversight.

## Seamless ecosystem integration

### Pre-built connectors and flexible integration options

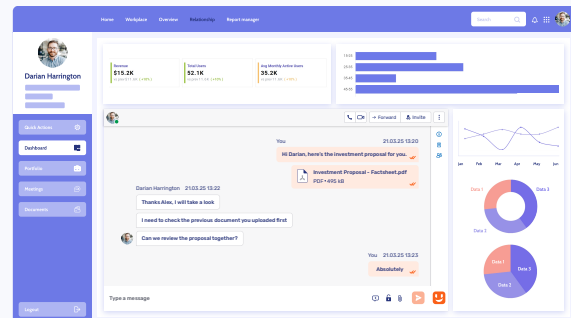
Unblu integrates seamlessly with leading CRMs and contact center platforms – empowering agents to provide faster, more contextual, and compliant customer support across every channel.

#### → One interface, all functions

Agents manage chat and calls from a single workspace – integrated with third-party connectors like WhatsApp.

#### → Real-time notifications

Agents are alerted to new messages, updates, or escalations instantly, ensuring timely, proactive responses.



#### → Context-rich conversations

Each interaction links to the customer's profile and case history, maintaining full context across channels and handovers.

#### → Improved adoption

Unblu fits seamlessly into existing environments, driving rapid agent adoption and higher satisfaction.

