

discovery 2

Opening

“Thanks everyone for joining today.

The idea of this session is really to review the current customer experience, identify some pain points we found during the initial discovery, and discuss a few opportunities around AI, security, self-service, and omnichannel support.

I’ll also walk through a high-level roadmap and some assumptions we made during the assessment.”

Executive Summary

“The main goals here are improving customer experience, reducing handling time, increasing self-service adoption, and improving security around authentication and payments.”

Channel Analysis

“Today customers interact through different channels like IVR, mobile apps, websites, social media, and branches.

One thing we noticed is there’s an opportunity to improve continuity between digital and voice interactions so customers don’t have to restart the journey every time.”

Current IVR Diagnostic

“From the initial discovery, the current IVR looks pretty menu-driven, which increases handling time and dependency on live agents.”

Competitor Benchmark

“We also looked at what other banks are doing around conversational AI, callbacks, and omnichannel engagement.

These types of experiences are becoming more common and expected by customers.”

Missing Opportunities

“Some of the opportunities we identified were things like voice biometrics, AI automation, fraud notifications, and smoother transitions between messaging and voice support.”

Compliance & Security

“From the security side, there’s also an opportunity to simplify authentication while reducing PCI exposure and improving fraud prevention.”

Future-State Experience

“The future-state idea is really simplifying the customer journey through conversational AI, biometrics, intelligent routing, and more secure self-service options.”

Integration Landscape

“A big part of the project would be integrations with core banking systems, CRM platforms, fraud systems, telephony infrastructure, and payment gateways.”

Security Architecture

“From the security perspective, we focused on encrypted communications, tokenized payments, biometric authentication, and centralized audit controls.”

Roadmap

“The rollout would happen in phases to reduce operational risk while validating integrations, security, and customer experience improvements.”

Phase 1 — Discovery & Assessment (Week 1)

“Review current IVR flows, integrations, customer journeys, and operational pain points.”

Phase 2 — Design & Planning (Week 2)

“Define AI workflows, biometrics, omnichannel interactions, and integration requirements.”

Phase 3 — Pilot & Testing (Weeks 3–4)

“Deploy pilot workflows, validate integrations, security controls, and measure KPI improvements.”

Phase 4 — Rollout & Optimization (Weeks 5–6)

“Production rollout, operational training, omnichannel activation, and continuous optimization.”

Discovery Questions

“Some of the key things we’d want to validate are:

- which customer journeys are driving the highest operational cost,
 - whether current APIs can support high authentication volumes, auth request per second/minute, etc.
 - any telephony or SIP limitations,
 - biometric consent and PCI requirements,
 - and which customer groups should be prioritized first.”
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Expected Outcomes

“Overall, the goal is improving customer experience, reducing operational friction, increasing self-service adoption, and strengthening security and compliance.”

Discovery Assumptions

“This assessment assumes the current telephony infrastructure stays in place, APIs are available for integrations, PCI controls already exist, and omnichannel engagement can be supported through existing digital channels.”

Customer Journey Slide

“This slide highlights some of the current friction points contributing to higher handling time and customer frustration.

Right now customers go through multiple menus, repeated authentication, and several routing layers before reaching resolution.”

Improved IVR Slide

“This proposed flow is focused on simplifying the customer journey using conversational AI, voice biometrics, intelligent routing, secure payment workflows, and omnichannel continuity.”

Fraud via WhatsApp Slide

“This is an example of how fraud interactions could start through WhatsApp, followed by biometric validation and automated account protection workflows.”

Fraud via WhatsApp Flow

1. Customer initiates fraud request via WhatsApp
2. Glia AI assistant collects initial information
3. Platform places outbound call to customer
4. Customer validated through voice biometrics

If biometric validation fails:

- Call routes to fraud specialist for manual validation
- Agent validates customer identity
- if Match Customer routed back to AI IVR workflow
- no match end call

If biometric validation succeeds:

- Customer provides last 4 digits or account number
- Credit card automatically disabled
- Confirmation sent via WhatsApp message

Omnichannel Slide

“Another opportunity is allowing customers to move between digital and voice channels without restarting the interaction every time.”

Omnichannel X / Social Media Flow

1. Customer posts complaint about Banamex on X
2. Glia social listening + AI detects customer complaint
3. AI reaches out offering a quick AI-assisted support call
4. AI initiates outbound call to customer
5. Customer validated through voice biometrics

If biometric validation fails:

- Call routes to fraud or customer service specialist for manual validation

If biometric validation succeeds:

- AI voice assistant starts the conversation
 - Customer issue identified and routed automatically
 - AI provides resolution or escalates if needed
6. Confirmation, case summary, and follow-up sent to customer

Closing

“Overall, the idea is simplifying the customer journey, reducing operational friction, improving self-service containment, and modernizing the experience while keeping strong security and compliance controls in place.

Any questions or areas you’d like to discuss further?”

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