



Enhance traders' digital experience with AI

With a growing number of FX traders comes greater challenges, such as maintaining regulatory compliance, and the cost of expanding into new markets whilst efficiently attending to growing customer needs. EBO's AI supports Forex companies, offering the platform and tools needed for **outstanding customer engagement**.

Scale your service as fast as your clients are growing their portfolios. Take advantage of every conversation with your traders and stay up to speed with their increasing demands and expectations.

Benefits

100+ languages

multilingual Virtual Agents

60–80% reduction

in inbound traffic from
support & KYC teams

Regulation- compliant

uphold different
jurisdictional requirements

Efficient onboarding

and create additional capacity

24/7, 365

Virtual Agents are available
all day, everyday



Forex Customer Support Challenges

60-80% of inbound enquiries are repetitive - mostly about AML, KYC, withdrawals, deposits, funding and onboarding issues. As the number of traders and their demands increase, so does the cost of having human customer support agents.

There is also a growing need to ensure regulatory compliance when handling customer queries. Human error when handling sensitive data can be risky.

Assist your traders better

EBO's AI Virtual Agents work alongside your customer service agents to quickly and accurately resolve customer issues.

Ensure that your customers are getting answers to their questions when and where it's most convenient for them. It also reduces the chance of regulatory liability by providing accurate information to customers at all times.

Chatbots just don't cut it

Forex companies that are using chatbots to automate their FAQs, don't quickly or efficiently resolve the issues customers have. Customers are far more likely to abandon a trading platform when frustrated with chatbots that aren't resolving their problems.

Chatbots vs AI Virtual Agents

Chatbots

- ✗ One-size fits all canned responses to questions
- ✗ No authentication layers
- ✗ No workflow automation at account level
- ✗ Inability to provide customers with contextual data from their account
- ✗ No empathy and very much a one-way conversation with a robot

AI Virtual Agents

- ✓ Personalised responses to every customer query
- ✓ Regulatory-compliant authentication layers
- ✓ Automated workflows at account levels
- ✓ Provides contextual customer data from their account when needed
- ✓ Empathetic two-way conversation indistinguishable from human agents



42%

of customers will abandon an online transaction if their query is not addressed quickly enough.

– Forrester survey

FORRESTER®

Increase satisfaction by improving customer interactions

EBO's AI Virtual Agents **reduce customer attrition and increase satisfaction by resolving 60-80% of repetitive questions**. Collect vital data needed for your Virtual Agent to improve with each interaction and provide you with important insights about your platform.

It is a lot of pressure to give a customer enough information as quickly as possible. I can see the advantage of the Virtual Agent. The faster we get information to customers, the more likely they are to continue with their application form or trading activity. It also puts us in a good light.



Milica Nikolic
Director at FxView

FXVIEW

Provide your traders with an **AI-powered two-way conversation that understands context and sentiment**, while continually developing.

The 3 pillars of EBO's Forex AI Virtual Agents

**Status
Updates**

**Customer
Engagement**

**Common
Questions**

1. Status Updates

Customers benefit most from status updates because they allow users to look up and amend their account details, and customer profiles, as well as perform specific transactions.

Types of status updates which we automate



Account Details

Customer notifications with information such as the additional KYC documents that have been requested - like card copies or bank statements.



Customer Profile

Customers can review and update their personal information on their accounts, including address, phone number, email or card details.



Specific Transactions

Notifies and assists customers to submit outstanding AML/ KYC documents, transaction statuses, and document requests.

Drive revenue with an AI Virtual Agent

Promote offers at just the right time, using an AI-powered Virtual Agent. Our Virtual Agents understand when to upsell or share an offer to customers reaching out.

Human agents can sometimes miss opportunities, whereas your Virtual Agent will never skip a beat.

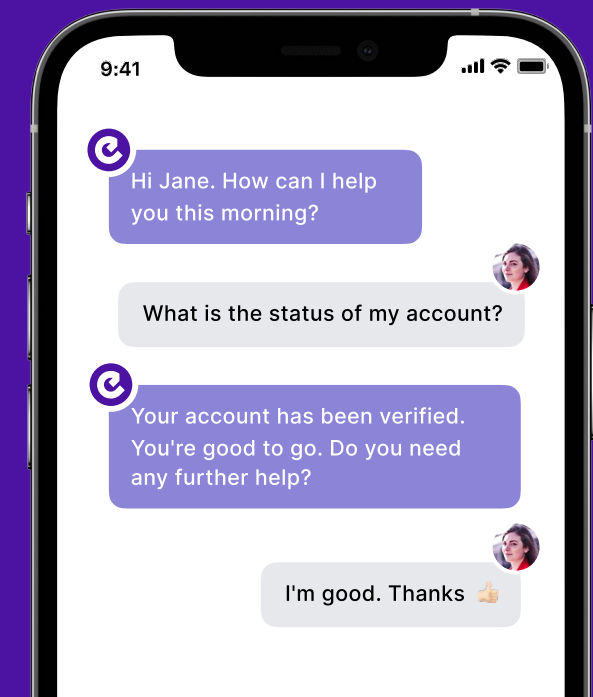
Customer authentication process

The flow of customer authentication differs depending on the initial information available to the Virtual Agent and the authentication methods used.

If a customer is logged in, the authentication process can be simplified.

Further details can be either directed to a human agent or specific information provided from the database.

Example of simplified authentication



2. Customer Engagement

Improve the engagement with your customers and simplify tasks with an AI Virtual Agent. Your traders will be able to have two-way conversations throughout their onboarding and KYC/AML processes, enhancing their user experience on your platform.

Customer benefits when engaging with EBO's AI Virtual Agents



Customer notifications with information such as the additional KYC documents that have been requested – like card copies or bank statements.



Clearly notify customers **which KYC/AML documentation is required** for signup, including document formats and when they should be dated.



Offer a **full onboarding process** through your customers' preferred channels, where they can ask questions and engage with your company.

3 crucial gains for Forex companies when adopting an AI Virtual Agent

1

Marketing & lead acquisitions

With one central learning model, EBO's Virtual Agent is available on communication channels relevant to each of your target countries (e.g. Viber/Telegram/WeChat). This assists with marketing and lead acquisition.

2

Personalisation based on data

The ability to draw on information from different disjointed systems together (through API-to-API connectivity), thus having more client data and the capability to handle more direct requests, effectively and efficiently.

3

Draw on insights to improve UX

Use valuable insights from various systems and present these to your traders for their benefit. These insights will also help you to improve customer experience on your platform, thus increasing retention.

3. Common Questions

Find customer answers quickly. EBO's Virtual Agents handle common requests to free up your human agents to deal with more complex customer support queries.

Reduce 60–80% of inbound traffic from your support and KYC teams.

Efficiently answer your customers' most common questions



Currency / Asset offers

Services and assets that your platform provides and any nuance with regards to country specificity or licencing.



Payment methods

Methods of payment that can be used, and how to use them including any specific rules related to these.



Processing times

Deposit, withdrawal and transfer type queries including those that require customer data.



KYC/AML documents

Document requirements and the formats they should be in, including details like when they should be dated.



Account status details

The status of customer accounts after the KYC/AML process or if data has been updated and needs verification.



Transaction statuses

Completed, pending or cancelled transactions that customers need more detailed information about.



Virtual Agents save the one thing that nobody has anymore – time. And time is money. This is how we can help our Forex customers to be more agile, save money and be more profitable



Paris Savva
Territory Channel Manager,
Microsoft

6 Key Benefits of EBO's AI Virtual Agents for Forex

1 Conversational AI Automation

- ✓ Forex-specific workflows help you maintain regulatory compliance.
- ✓ Functional workflows are also, themselves, compliant with important government and industry standards and regulations.

2 Fast & Superior Customer Experience

- ✓ Virtual Agents that can communicate in 100+ languages.
- ✓ Human Handover capabilities when necessary.
- ✓ Reduce inbound traffic to your support and KYC teams.
- ✓ Omni-channel customer support, including corporate websites, forex-developed apps and social-messaging.

3 Cost-effective scalability

- ✓ Scale your customer engagement capacity according to your customer growth.
- ✓ Virtual Agents are available 24/7, 365 days a year to answer customer questions immediately and with empathy.

4 End-to-end implementation service

- ✓ Out-of-the-box integrations such as Salesforce, LiveChat, Zendesk and more.
- ✓ Project management from start to launch with EBO's team of Forex experts who understand your business.
- ✓ Support and continuous improvements are guaranteed.

5 Out-of-the-box data analytics

- ✓ Crucial insights that you can't get from a chatbot.
- ✓ Valuable data including outcomes, sentiment analysis, retention ratios, profiling and more.
- ✓ Connected to your back office and BI system.

6 Easy & quick implementation

- ✓ Implementing your Virtual Agent takes 3 weeks for a first viable candidate.
- ✓ Reach customers wherever they are. Deploy on any channel.
- ✓ A secure Microsoft Azure environment: scalable, fast, and reliable.

Realise Benefits Through EBO's Delivery and Implementation

The EBO solution can be delivered in two ways:



Standalone mode

with no integration for quicker deployment

or



Fully integrated

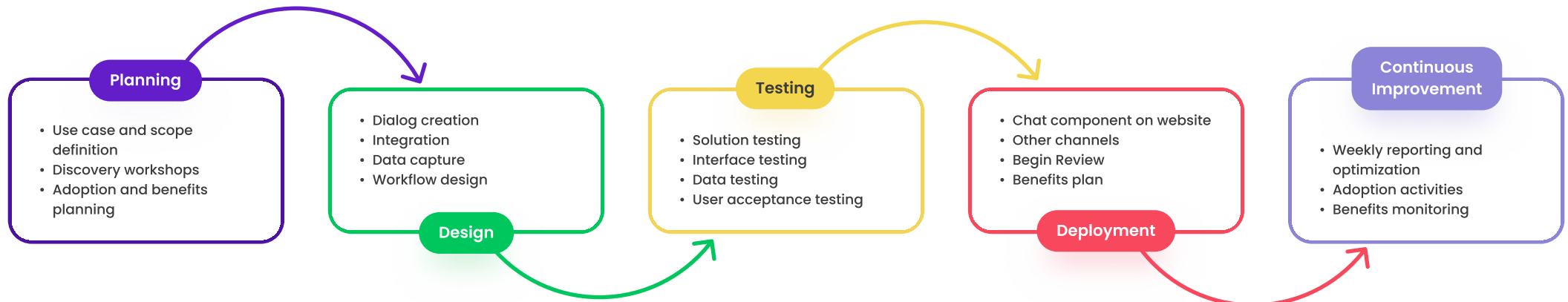
with your CRM system for maximum benefits

With over 100 years of collective experience in the financial services sector, we know that implementing digital transformation projects can be tricky.

This is why our solution comes with a strong implementation and service component built-in. We offer complete project management and benefits realisation services, so you can rest assured of your projects' success.

Our conversation design expertise and continuous improvement process do not stop at Go Live - rather optimisation is ongoing throughout the life of the product.

Project Planning with a Strong and Continuous Benefits Realisation Cycle



Want to learn more about how your Forex Company will benefit from an AI Virtual Agent?

[Learn more](#)

Contact us for a free consultation

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