ARTIFICIAL INTELLIGENCE TO ADDRESS THE WEALTH MANAGEMENT INDUSTRY

Marc Stähli, Senior Vice President Global Sales

Milano, November 16th 2018

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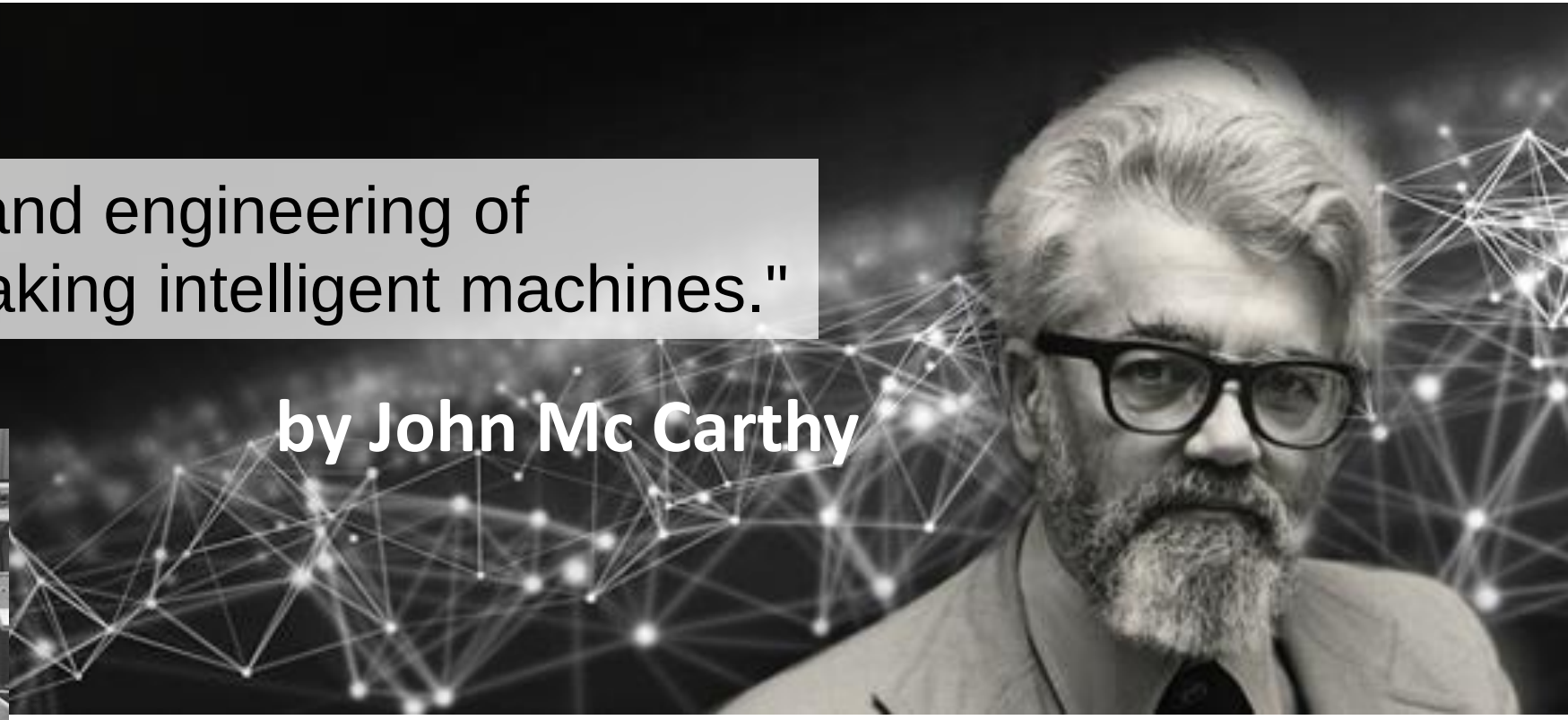
Mid-1950s First Definition of AI…

"The science and engineering of making intelligent machines."

by John Mc Carthy



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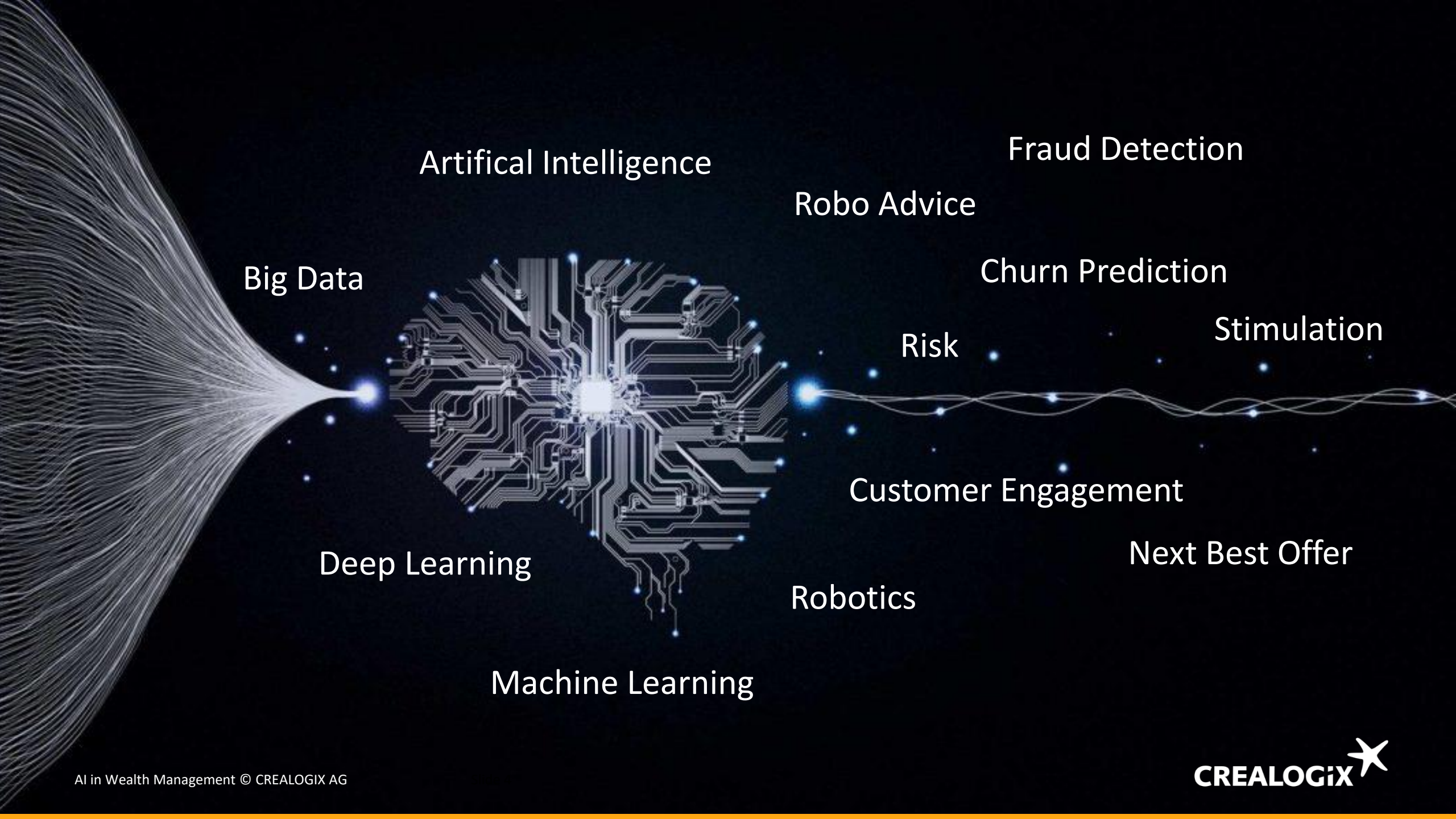
Artifical Intelligence
Fraud Detection
Robo Advice
Big Data
Churn Prediction
Stimulation
Risk
Customer Engagement
Next Best Offer
Deep Learning
Robotics
Machine Learning

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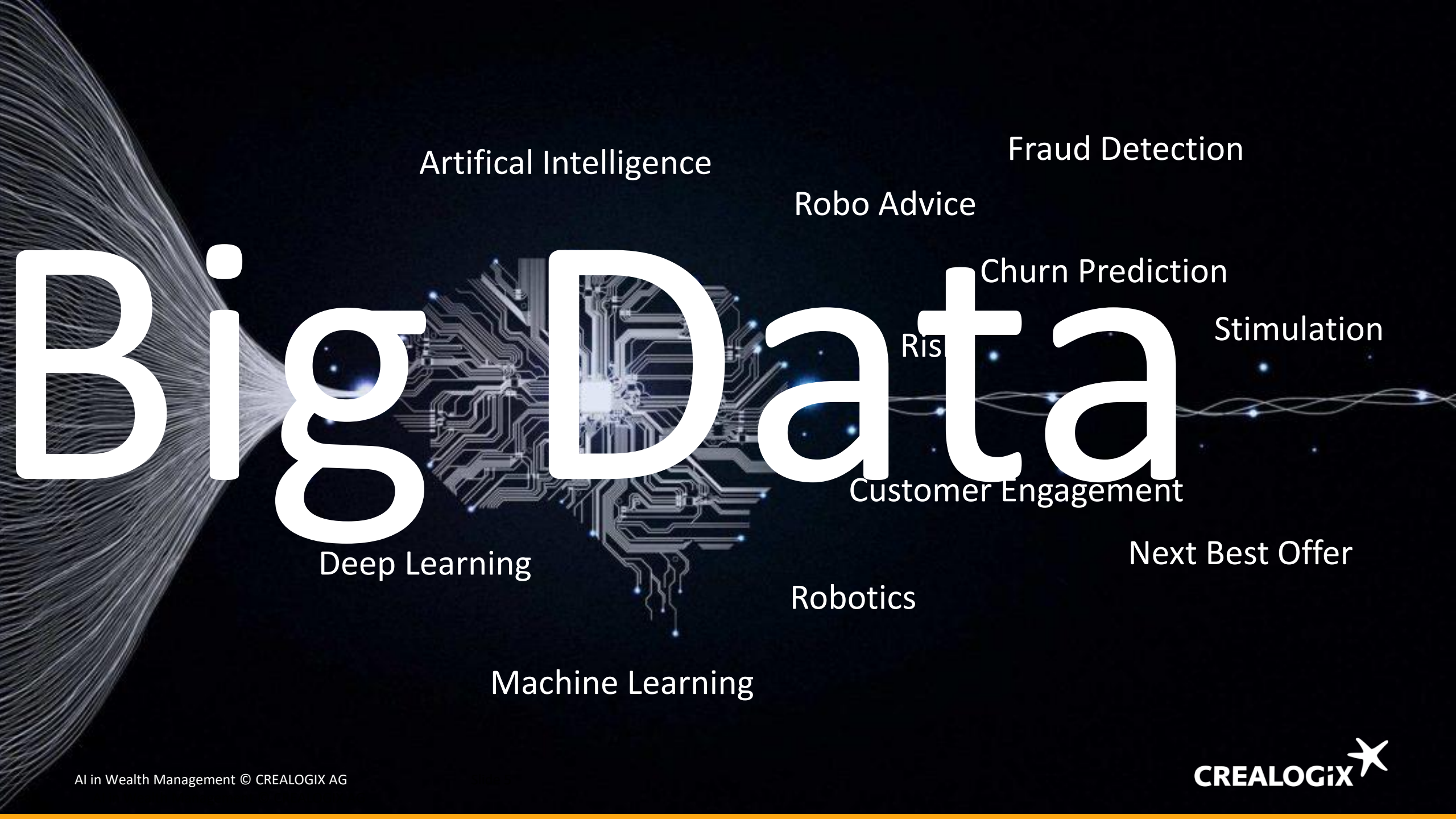
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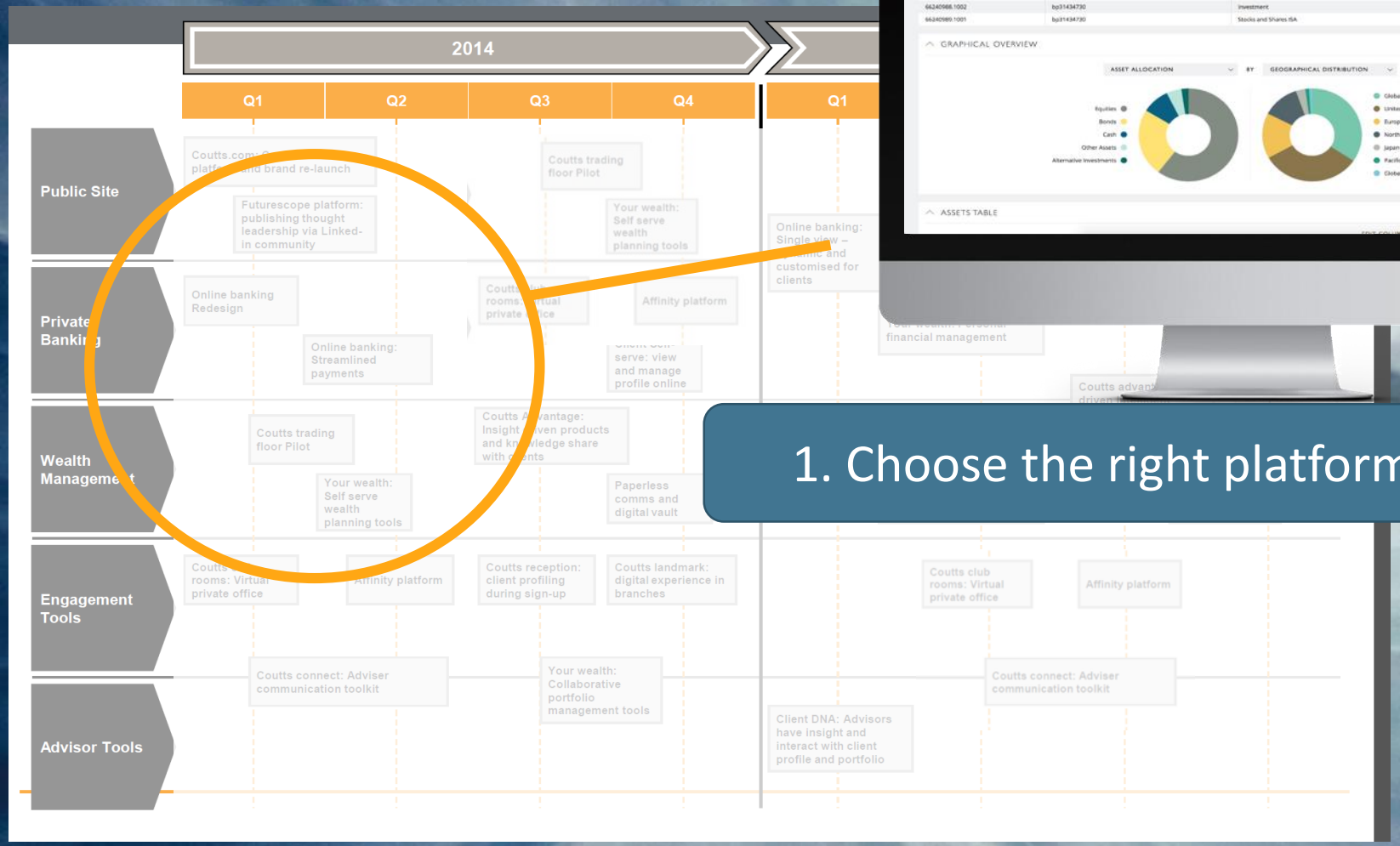
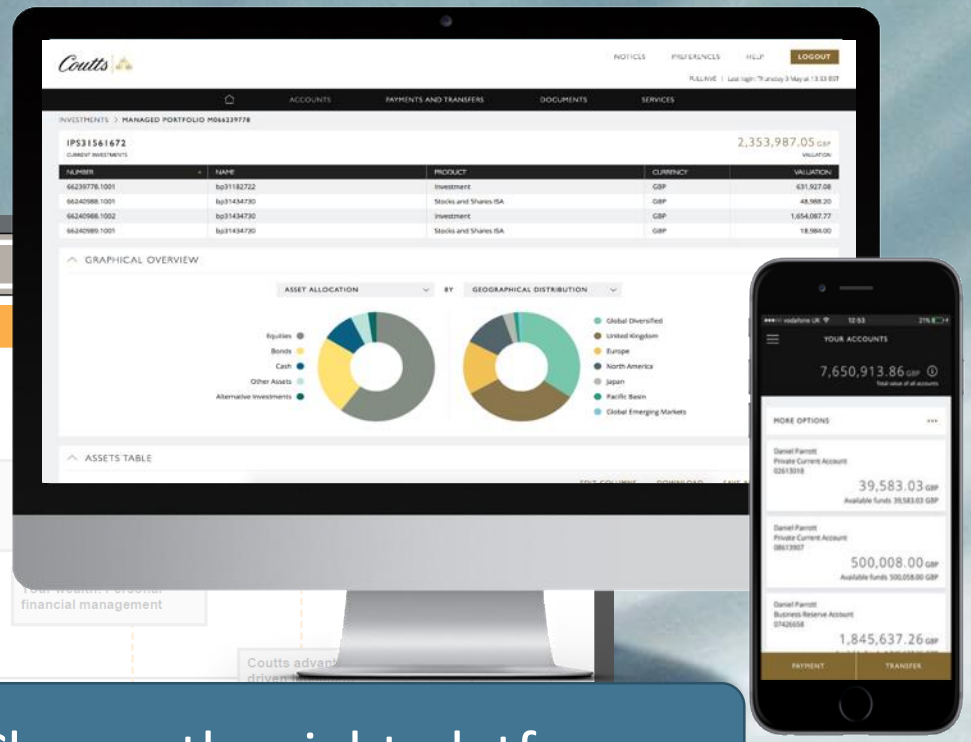
It is a journey – not a tool





1. Choose the right platform

It is a journey – not a tool

2. Arm your Advisors

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It is a journey – not a tool

3. Engage with your customers

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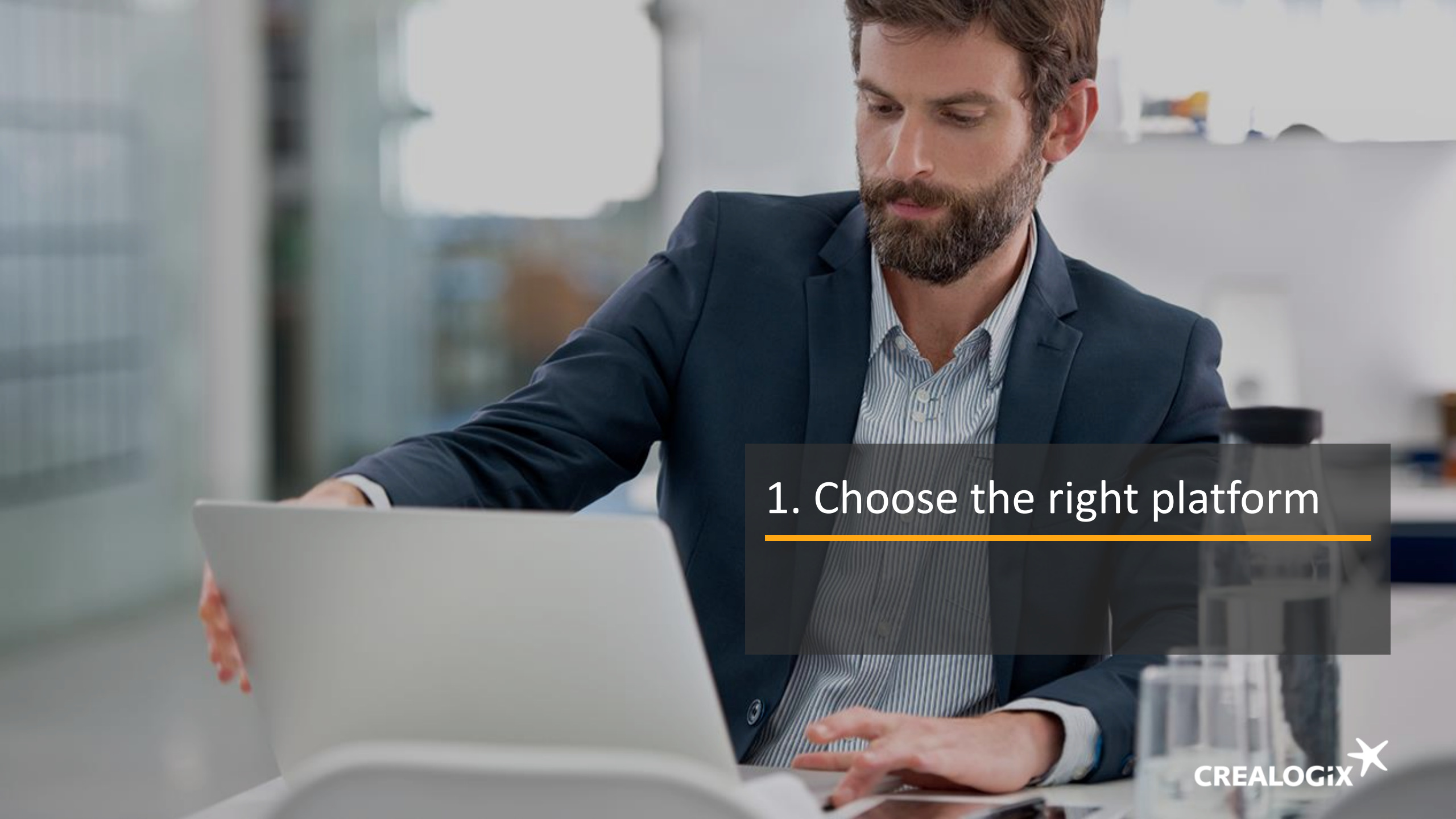

1. Choose the right platform

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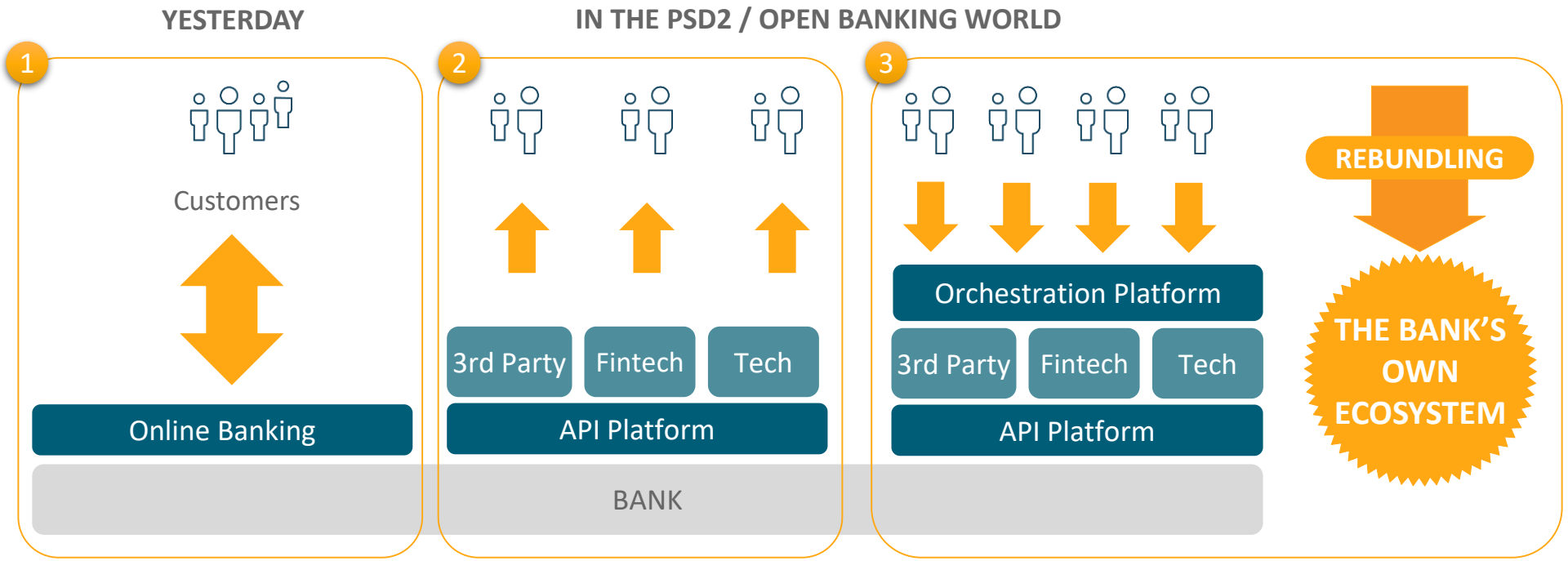
The right platform must be open



- Make your customers happy with more services & relevant services
- Make your data miner happy with more services.

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2. Arm your Advisors

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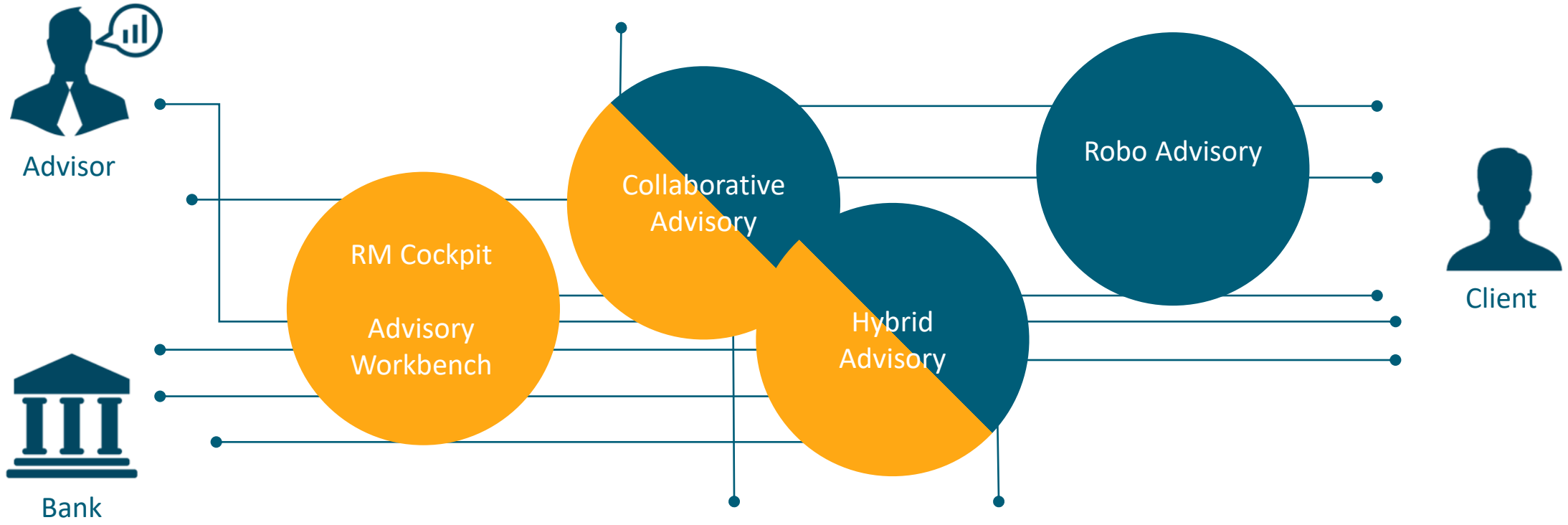
Advisory in the digital world



RM Cockpit

„Digital Sales System“

Live feed of

- Performance Data
- CRM
- Research
- Recommendations
- Social Media Feed

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Collaborative Advisory

CHAT!

TALK!

SHARE!

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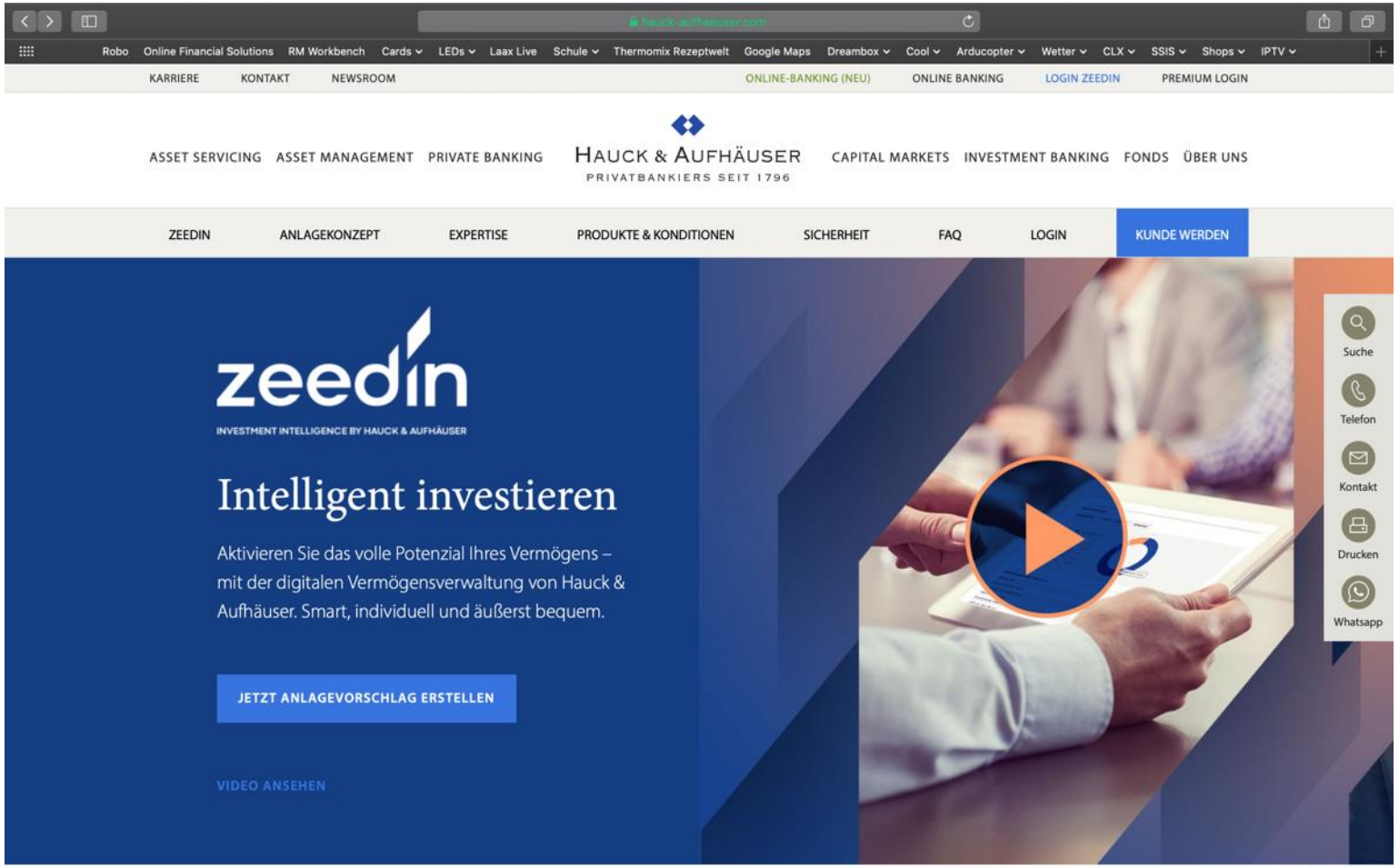
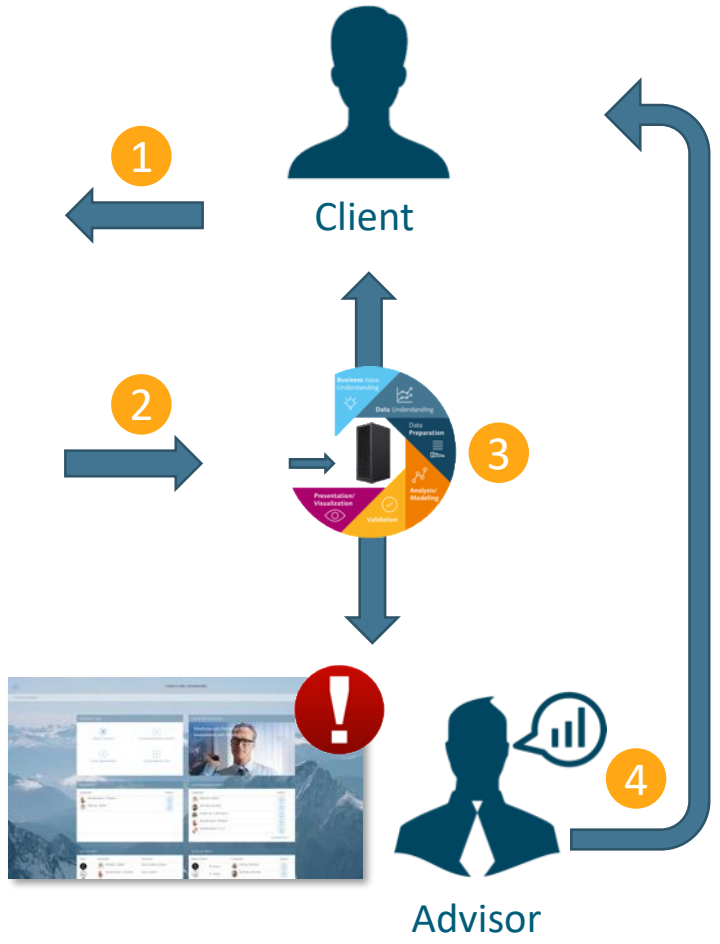
Bionic Robo Advisory



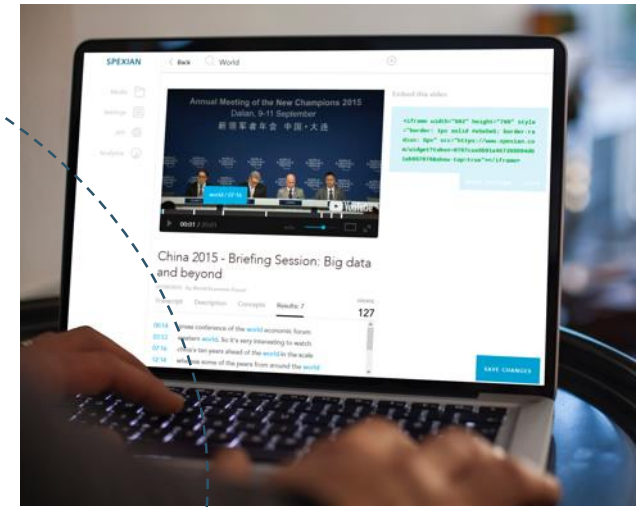


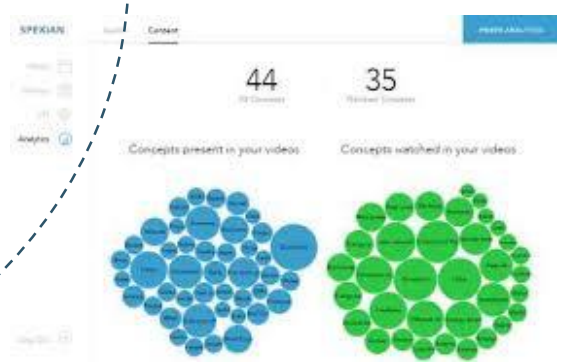
AI in the advisory process: Speech-to-context conversion

- Research
- CRM
- Past Phone Calls
- Risk Class
- Past Meetings
- Recommendations
- KPIs
- Customer´s Targets

SPEXIAN

Gold, Renewable Energy, ETF





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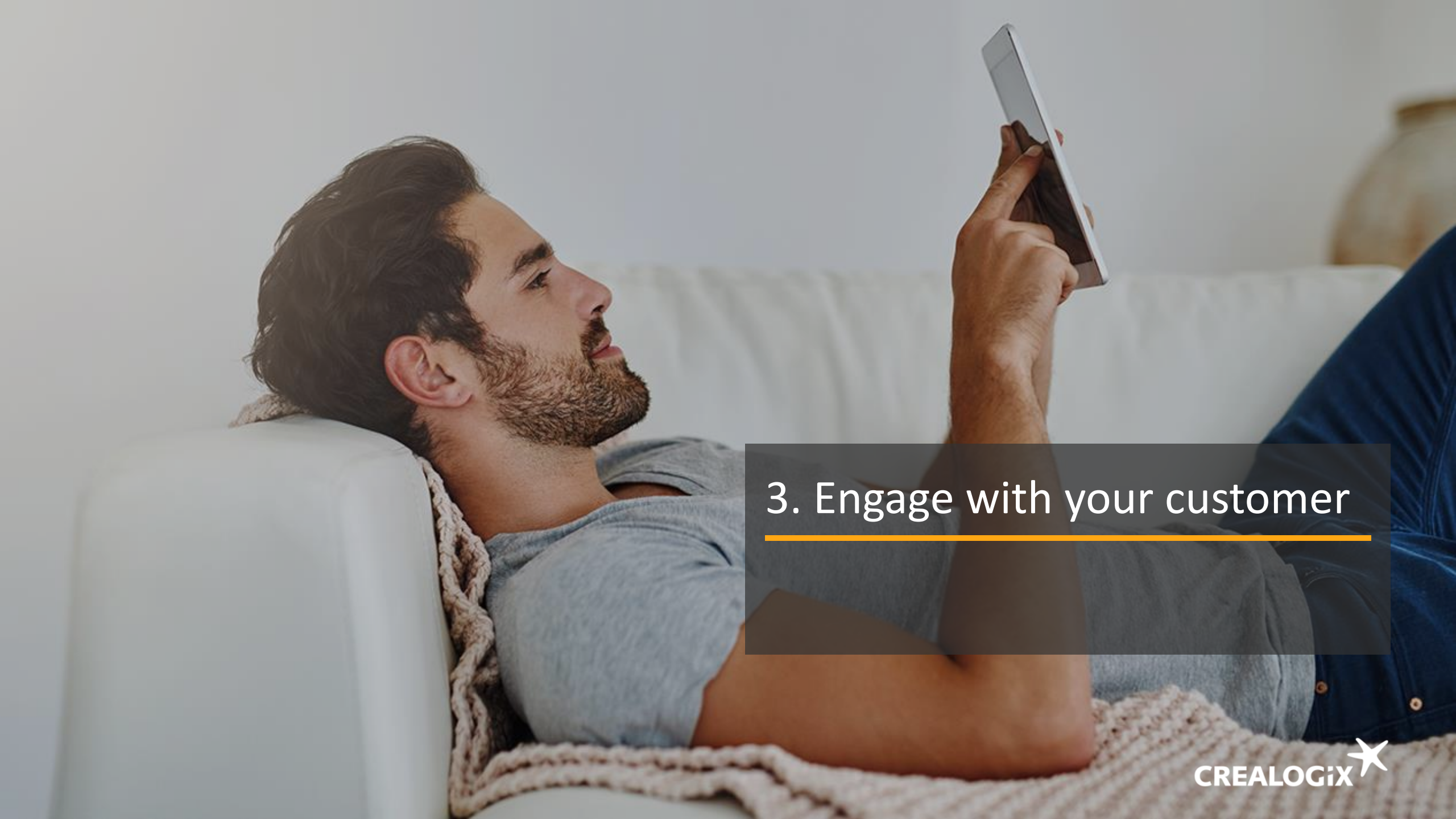

3. Engage with your customer

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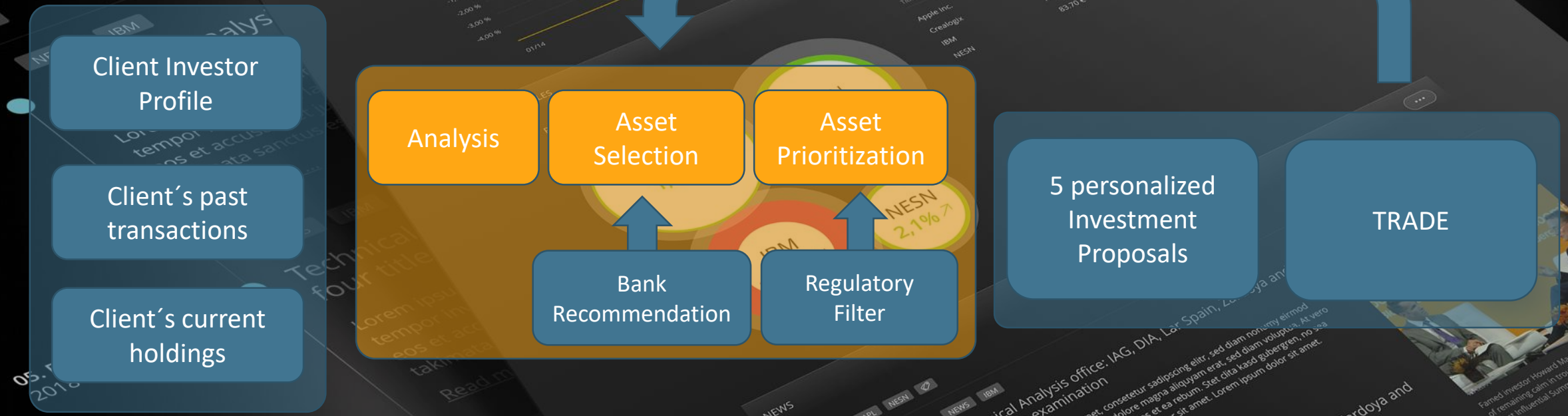
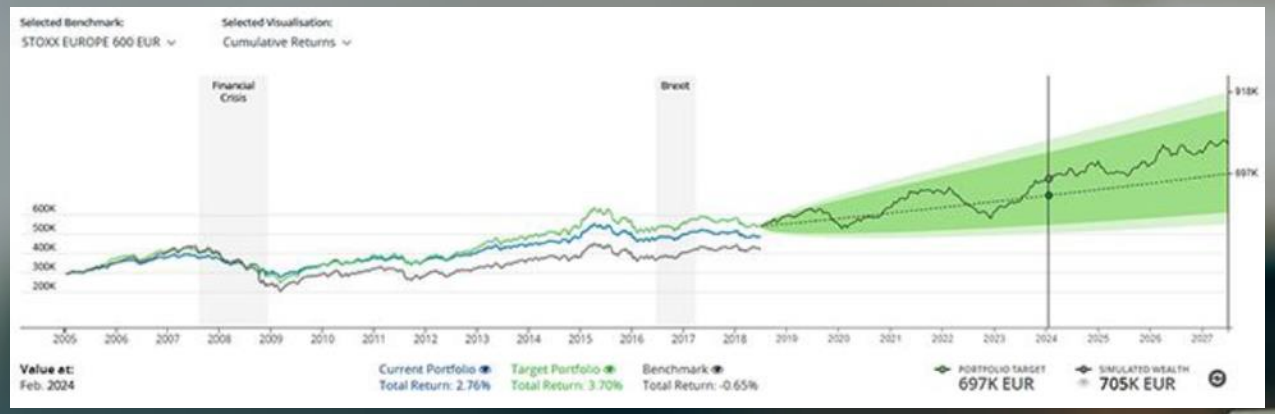
AI Recommender / Next best offer

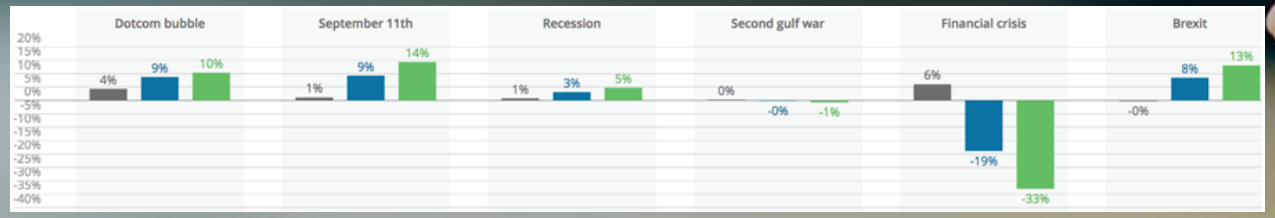


Simulation / Stimulation

«I can understand and simulate the impact on my portfolio (historical+future) from the investment ideas I get from the AI Recommender, market data information and portfolio alerts.»



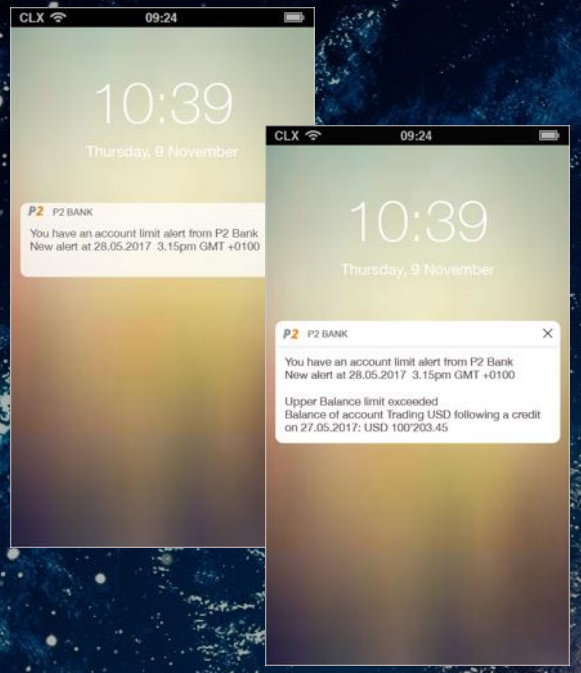
Past course and future projection



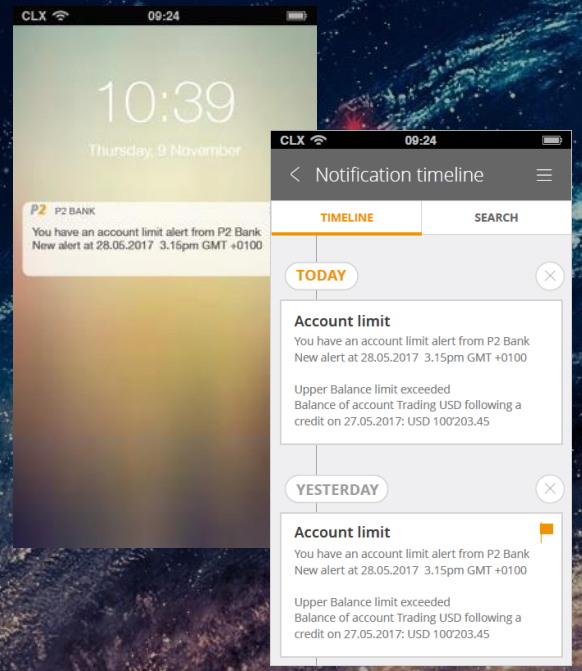
Robustness across major events

Smart injection on mobile devices

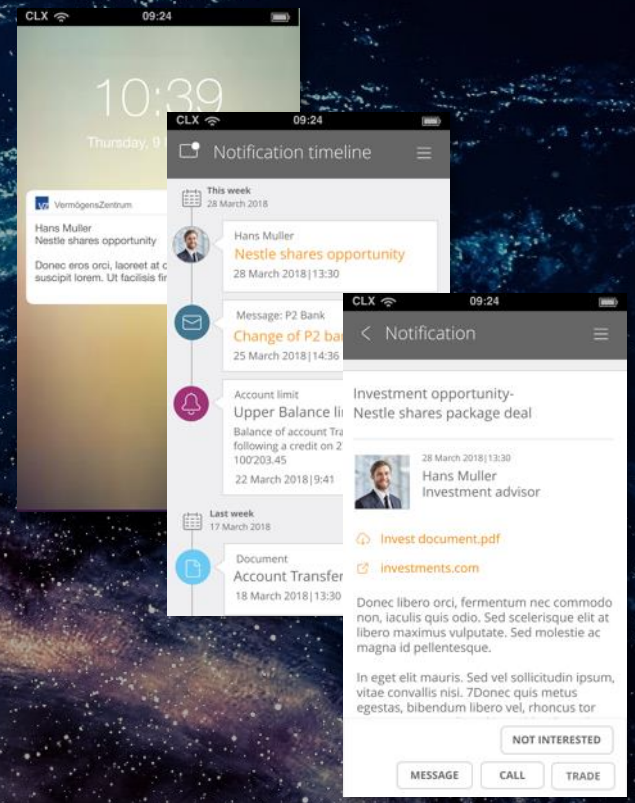
«Push Alerts»



«Smart Alerts»



«Push Campaigns»



Smart injection on all devices

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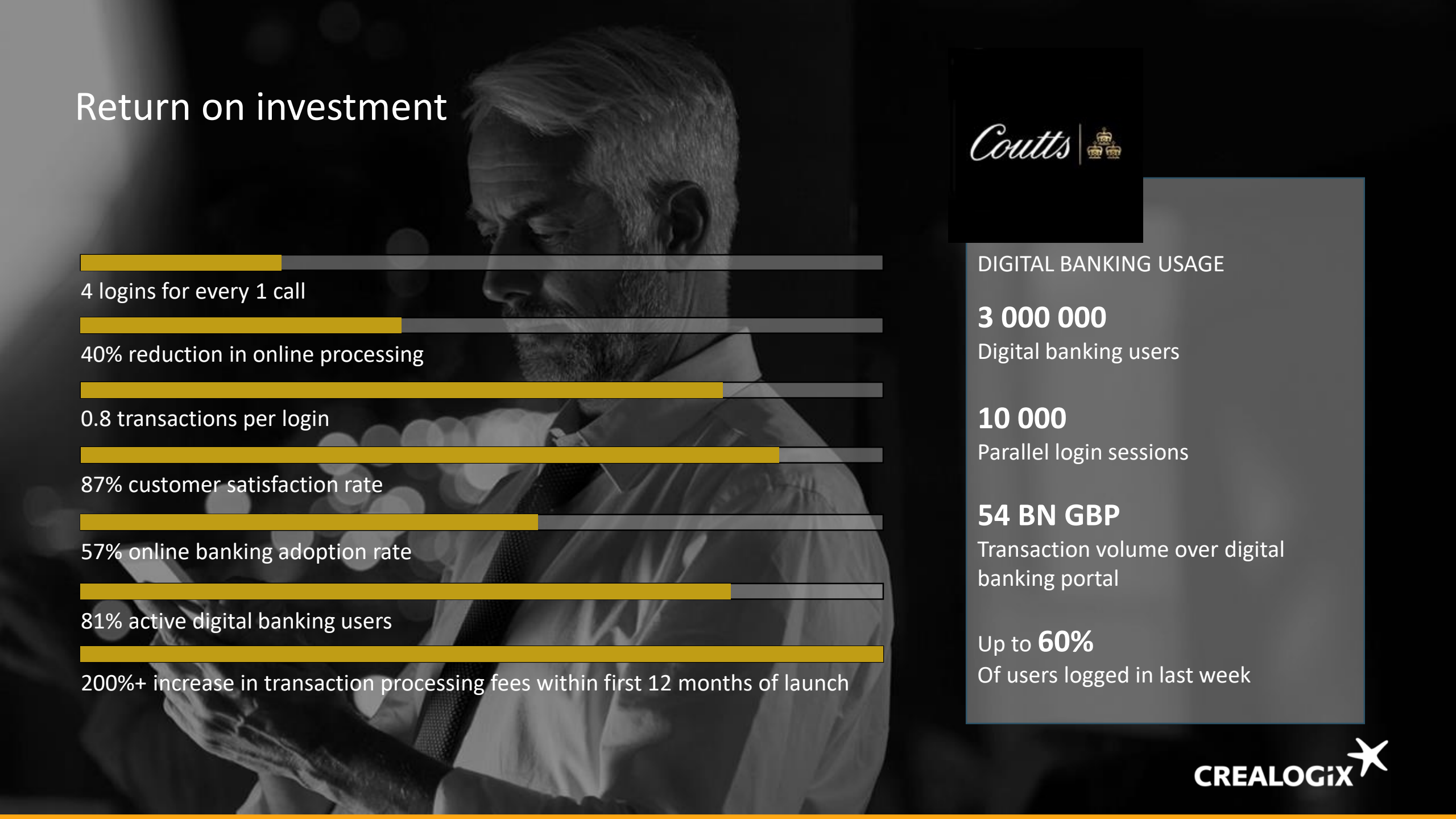
Return on investment



- 4 logins for every 1 call
- 40% reduction in online processing
- 0.8 transactions per login
- 87% customer satisfaction rate
- 57% online banking adoption rate
- 81% active digital banking users
- 200%+ increase in transaction processing fees within first 12 months of launch

Coutts

DIGITAL BANKING USAGE

3 000 000
Digital banking users

10 000
Parallel login sessions

54 BN GBP
Transaction volume over digital banking portal

Up to **60%**
Of users logged in last week

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We create digital leaders.

marc.staehli@crealogix.com

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