



CONNECT BETTER & SERVE FASTER





WHY CHOOSE DIRECTLINK?

We understand community banks and credit unions. Directlink is purposefully built to address the unique challenges and opportunities you face. Choosing Directlink is more than just adopting a platform; it's aligning with a vision - a vision of superior customer service, operational efficiency, and a commitment to pushing the boundaries of what's possible in conversational banking. With us, you're not just another client; you're a partner.

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WHAT IS DIRECTLINK?

Directlink is an AI powered conversational banking platform built for Community Banks and Credit Unions to effortlessly meet their customer and member needs in real-time. Directlink delivers a secure, compliant, best-in-class customer experience through hyper-personalized interactions, all while seamlessly integrating into your FinTech ecosystem.



Always On

Directlink's AI assistance ensures constant availability, offering real-time banking support around the clock, enhancing customer convenience.



Fast & Accurate

The platform's advanced algorithms provide swift and precise responses, streamlining customer interactions and decision-making processes.



Compliant

With a focus on security, Directlink maintains high standards of compliance, ensuring that all transactions and interactions are protected.



Scalable

The technology is designed to grow with the institution, supporting an increasing volume of interactions without compromising service quality.



Flexible

Directlink's platform adapts to the unique demands of community FI's offering customizable features that fit various customer service strategies and operational workflows.

THE DIRECTLINK ADVANTAGE

In today's competitive banking landscape, community banks and credit unions are tasked with marrying cutting-edge technology with the personal touch that sets them apart. This is where Directlink shines. Directlink was made to meet your financial institution's needs without adding unnecessary complexity.

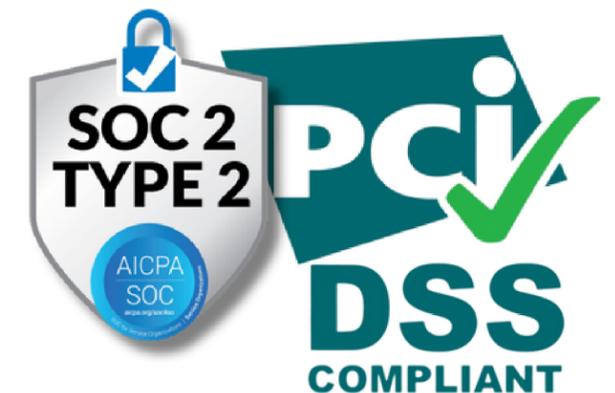


HUMAN TOUCH ANYTIME

When you need a person, our platform seamlessly shifts from AI to a live agent. With chat, calls, video, and secure sharing, it's like having a friendly bank assistant online.

UNPARALLELED SECURITY

Dive into the future of banking, backed by state-of-the-art encrypted security ensuring every conversation and transaction is private and protected. Adherence to the highest levels of PCI and SOC2 compliance and regular updates to meet evolving regulatory requirements ensure that every transaction and interaction is secure and within legal bounds.



CONVERSATIONAL BANKING IS THE FUTURE OF FINANCIAL INTERACTIONS

CONVERSATIONAL BANKING

Conversational banking isn't just a trend; it's the next frontier in customer engagement. It's the sweet spot between technology and personal touch. By fostering open dialogue, you can tap into the nuances of your customers' individual needs, preferences, and concerns. This isn't just about transactions. It's about building long term relationships.

Absolute Compliance

Core Orchestration

Real-Time Solutions

Personalized Banking Experiences

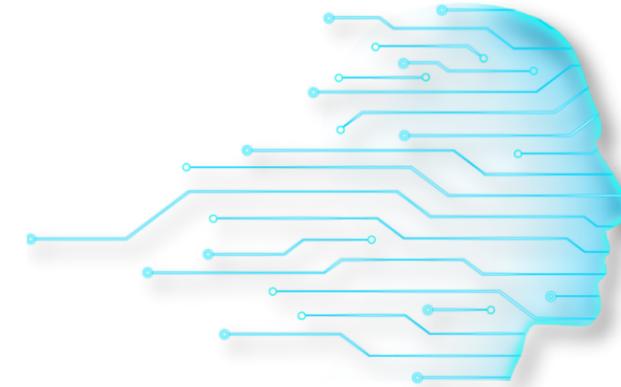
Instantaneous, Precise Responses

WHY USE CONVERSATIONAL AI IN BANKING?

Conversational AI enhances customer service with immediate, accurate responses, reducing wait times and freeing up staff. It offers personalized banking by leveraging customer data and behavior patterns for individualized recommendations. The platform provides real-time solutions, utilizing Machine Learning and Natural Language Understanding for dynamic, multi-language communication. It also integrates with other digital platforms, ensuring a seamless experience and personalized product suggestions, epitomizing a comprehensive banking solution.

INTELLIGENT VIRTUAL ASSISTANTS

Imagine an assistant that not only hears your customers but truly understands them. Our IVAs, powered by the potent combination of Artificial Intelligence (AI) and Natural Language Understanding (NLU), do just that. When a customer communicates, our system delves deeper into the context and intent, offering responses that hit the mark every time. This meticulous approach ensures that even the most intricate banking inquiries are handled with precision and care.



INTELLIGENCE AT YOUR FINGERTIPS

- ✓ **Voice Optimized Interactions**
- ✓ **Intent Recognition**
- ✓ **Robust Security Protocols**
- ✓ **Contextual Awareness**
- ✓ **Dynamic Text to Speech**
- ✓ **Natural Language Understanding**

ALL-IN-ONE MANAGEMENT PORTAL

DIRECTLINK PORTAL

The centralized platform for managing the diverse functionalities of its conversational AI system. It serves as a command center where users can oversee AI interactions, update system configurations, and access comprehensive analytics, all in one user-friendly environment.

NO CODE AI MANAGEMENT

Directlink's Management Portal boasts a no-code content management system, allowing users to update the AI model in real-time without programming skills. The AI analyzes patterns, queries, and feedback to suggest content enhancements, ensuring it adapts to customer needs, enhancing response accuracy.

Directlink employs generative AI for model training, going beyond traditional algorithms. This cutting-edge approach generates new training scenarios and responses, anticipating diverse customer inquiries and interactions, enhancing each institution's unique AI model.



DATA & ANALYTICS

The management portal provides comprehensive insights into customer interactions, AI performance, and user engagement metrics. Financial institutions can leverage these data points to understand customer behavior better, evaluate the AI's effectiveness, and identify trends that can inform strategic decisions.

TRANSLATION

Write and translate content with just a click of a button. With this feature, users can instantly create or translate content, ensuring that the AI can communicate effectively with customers in their preferred language.

The results exceeded our expectations, handling approximately 4,000 inquiries with a 67% success rate

**AVP Member Solutions
CFCU Community Credit Union**

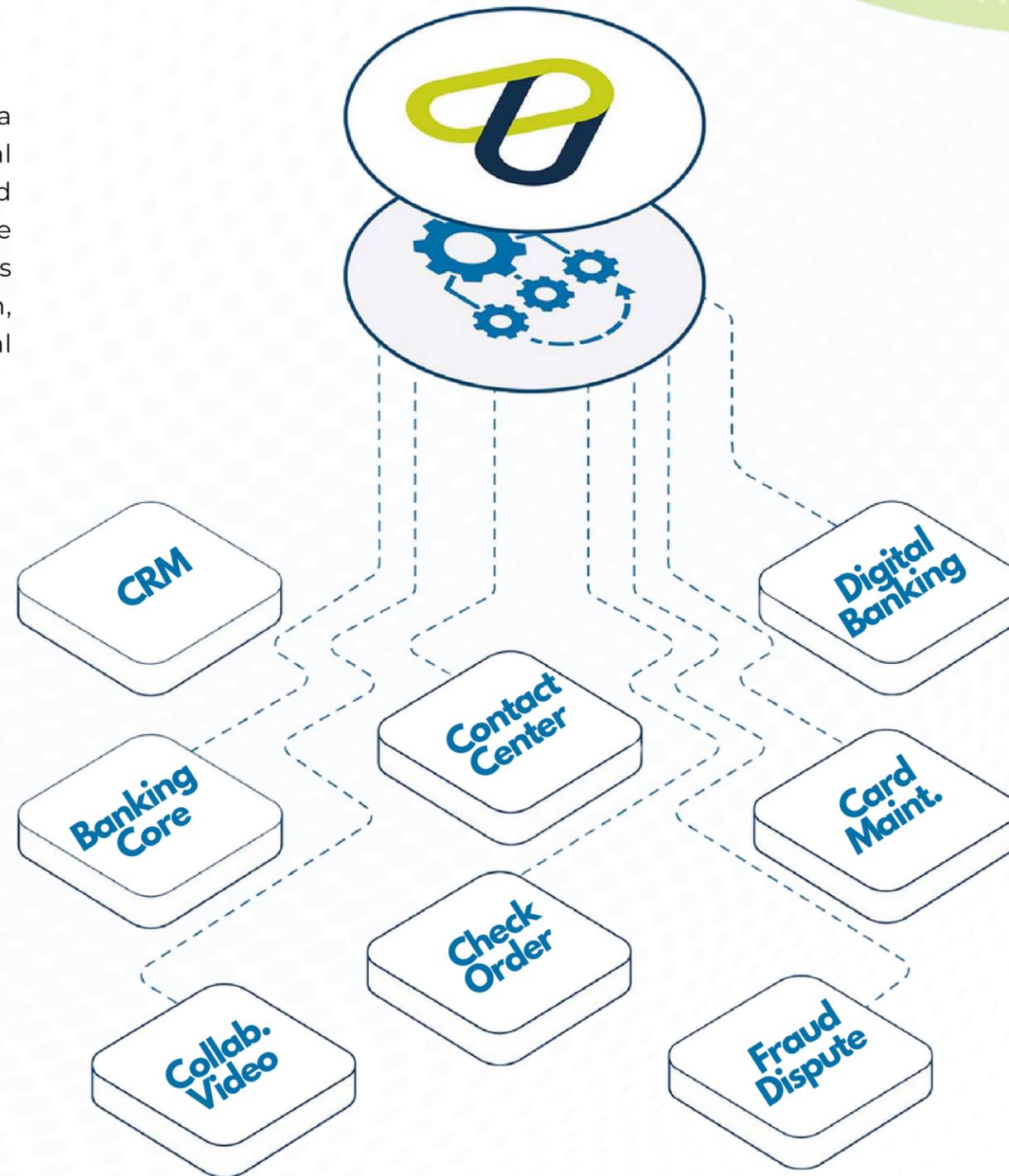
ONE PLATFORM, INFINITE CONNECTIONS

CORE ORCHESTRATION

Directlink's Core Orchestration stands as a fundamental pillar of its technological framework, providing a seamless and integrated experience across various core digital banking systems. Core orchestration is the heartbeat of Directlink's platform, ensuring that all components of a financial institution's tech stack work in harmony.

EFFICIENCY & COST SAVINGS

By automating and streamlining tasks that traditionally require manual intervention, you can redirect valuable human resources to more strategic, value-added tasks. This not only improves operational efficiency but can also lead to significant cost savings in the long run.



ENHANCED CUSTOMER EXPERIENCE

As customers increasingly demand instant and flawless digital experiences, Directlink ensures that your processes run in the background without hitches. The outcome? A frictionless user experience, increased customer satisfaction, and boosted loyalty.

REDUCED NEED FOR DEVELOPMENT

Financial institutions often grapple with the challenge of custom-developing solutions to ensure various systems work together. Directlink's standardized skill-building methodology eradicates this need, offering you out-of-the-box integration capabilities that save both time and money.

SEAMLESS TRANSITION FROM AI TO LIVE AGENTS

Welcome to Directlink Financial. How can I assist you today?

What is my savings account balance?

Sure thing! Your current savings account balance is \$3,250. Anything else?

I'd like to increase my credit limit

Great! Let me transfer you to an agent to assist

Good Afternoon, Chris. Thank you for reaching out to DL Financial.

I see you're interested in raising your credit limit. I can assist with that!

That's Correct!

Great! Let's get started.



DIRECTLINK'S COMMUNICATION PLATFORM SPANS ACROSS:

VOICE

Telephony remains integral to customer interactions. In a world where customers are accustomed to digital conversations across devices, Directlink empowers financial institutions to offer this flexibility on their platforms. |



VIDEO

In the ever-evolving world of banking, personal touch still holds immense value. While in-person interactions may not always be feasible, Directlink's Video Chat ensures that your customers always have access to face-to-face assistance.



LIVE CHAT

Engage in real-time, sharing images, documents, and more. With a history of AI chats at their disposal, our live agents have the full context, ensuring no conversation detail is lost in transition.



CO-BROWSING

Guide customers through multifaceted tasks with our co-browsing feature. Collaborate in real time, navigating through web pages or applications. Prioritizing privacy, our co-browsing is strictly confined to your website, ensuring complete confidentiality for your members.



DIRECTLINK BY THE NUMBERS

3-5X

Projected ROI - 18mo post go-live

+800

Self Service FAQs

+50,000

Calls automated per financial institution per year

93%

First Contact Resolution

+\$750K

Funds transferred via AI per financial institution per year

35-50%

Inbound Automation

60-90

Days to Onboard

+40

Pre-built Banking Skills



A NEW ERA OF CUSTOMER ENGAGEMENT

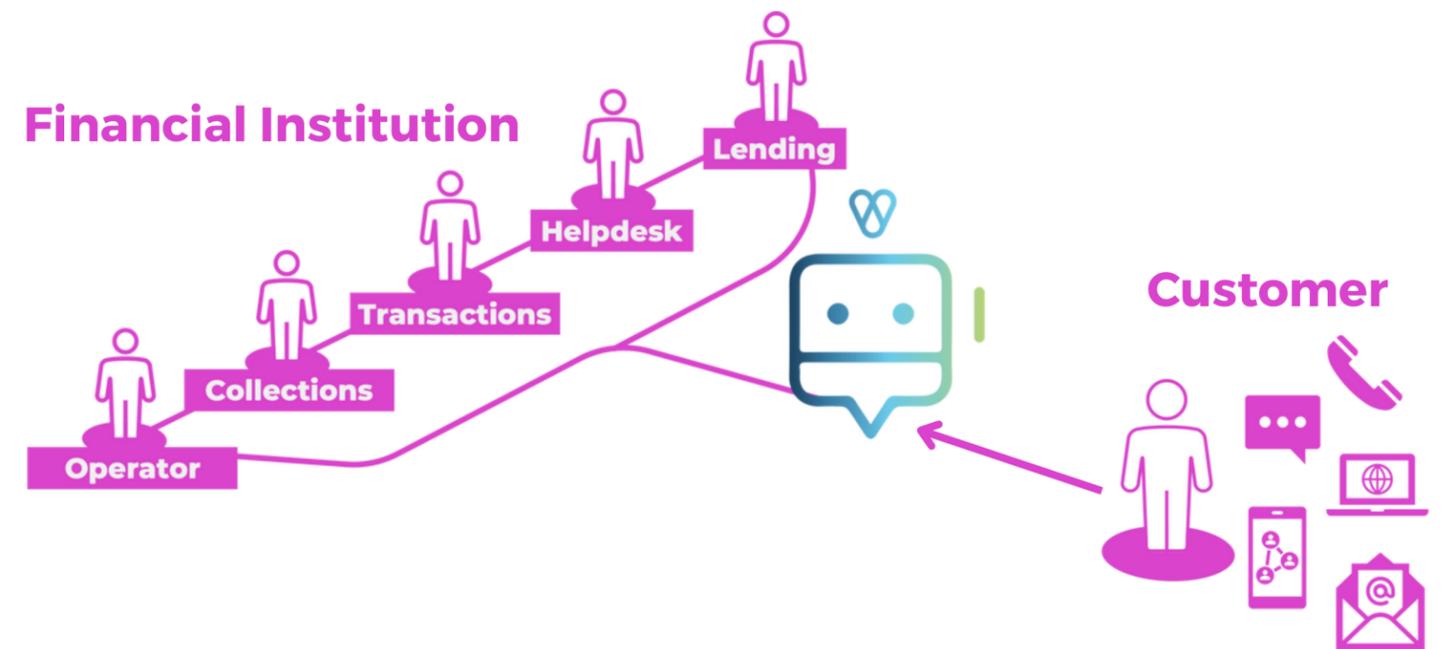
CUSTOMER BENEFITS

Directlink elevates the customer banking experience by offering 24/7 service and personalized, efficient interactions. Utilizing conversational AI, it provides prompt and accurate responses, mimicking human interaction for greater convenience and satisfaction. Its omnichannel approach allows customers to choose their preferred communication method, whether webchat, voice, or video, catering to individual preferences.



INSTITUTIONAL BENEFITS

For financial institutions, adopting Directlink offers a variety of strategic advantages. Firstly, the platform's ability to automate routine inquiries and integrate various communication channels leads to significant operational efficiency. This reduction in manual workload and streamlined processes result in cost savings and allows institutions to allocate resources more effectively.



EMPLOYEE BENEFITS

Directlink benefits financial institution employees by automating routine tasks and reducing workload, allowing them to instead focus on complex customer interactions. This improves job satisfaction and stress management.

Advanced analytics provide insights into customer behavior, aiding in personalized service. Additionally, Directlink's tools enhance internal communication and workflow, supporting strategic decision-making and service improvement.

LET AI BE YOUR FRONT-LINE

Directlink's data-driven approach offers deep insights into customer behaviors, aiding in targeted marketing and service offerings. This enhances personalized experiences, boosting customer loyalty and retention. Its compliance and security features protect against data breaches and regulatory risks, bolstering institutional reputation and reliability.



CLIENT TESTIMONIALS

We are proud to present testimonials from our valued clients, reflecting the transformative impact Directlink has had on their institutions and customers.

At Telco, we've always believed in the power of community and service. With Directlink, we feel we have reached the most cost-efficient and effective way of meeting our members where they want to be met. Some members just want to pick up the phone and call, where other members would rather use online services. It is our goal to ensure each member is taken care of 24/7, in their own preferred way. This partnership with Directlink has allowed us to provide better member service, during all hours of the day, without compromising our staffing or hours of operation.

David Burnette
CEO, Telco CCU

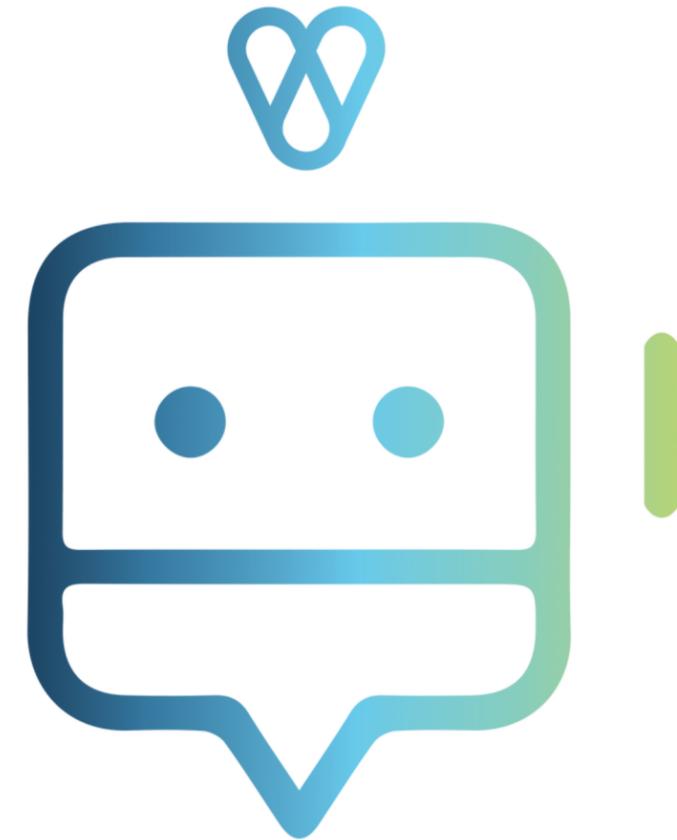
The results we've seen in just the first few weeks of implementation are remarkable – over 60% of routine banking tasks automated and a substantial number of our customers are engaging after hours.

We've found a win-win partnership with Directlink, one that demonstrates the potential for community banks to thrive in the digital age without compromising their core values.

Lori Tucker
Chief Experience Officer, United Bank of Georgia

"The results exceeded our expectations, handling approximately 4,000 inquiries with a 67% success rate"

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directlink.ai

ABOUT

Directlink is an all-in-one conversational banking platform designed for Community Banks and Credit Unions. Seamlessly transition from AI to human support, meeting real-time customer and member needs. Enjoy secure, compliant, hyper-personalized interactions while effortlessly integrating into your FinTech ecosystem for a superior customer experience.



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