



salesforce

PARTNER

Why Your Enterprise Needs AI?

WEBINAR



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MODERATOR

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SPEAKER

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COO, AblyPro



Understanding the Enterprise Landscape



4 Steps to Leverage AI

01

Decide What to Predict



Get Historical Data in Order

02



03

Turn Predictions into Actions



Enhance Your Actions

04

Situation 1

Customer A holds Savings and Current Account. He closes Savings Account.

Situation 2

Customer B has single account and moves 90% assets to another bank.

- ↳ Bank defines customer attrition
- ↳ Wants to predict such customers



If you can't report it, you can't predict it.

Special promotion to customers with attrition chance > 25

Personalized email content with special promotion generated using Generative AI sent to customers

Example Attrition in a bank

ENTERPRISE OVERVIEW

AirLink

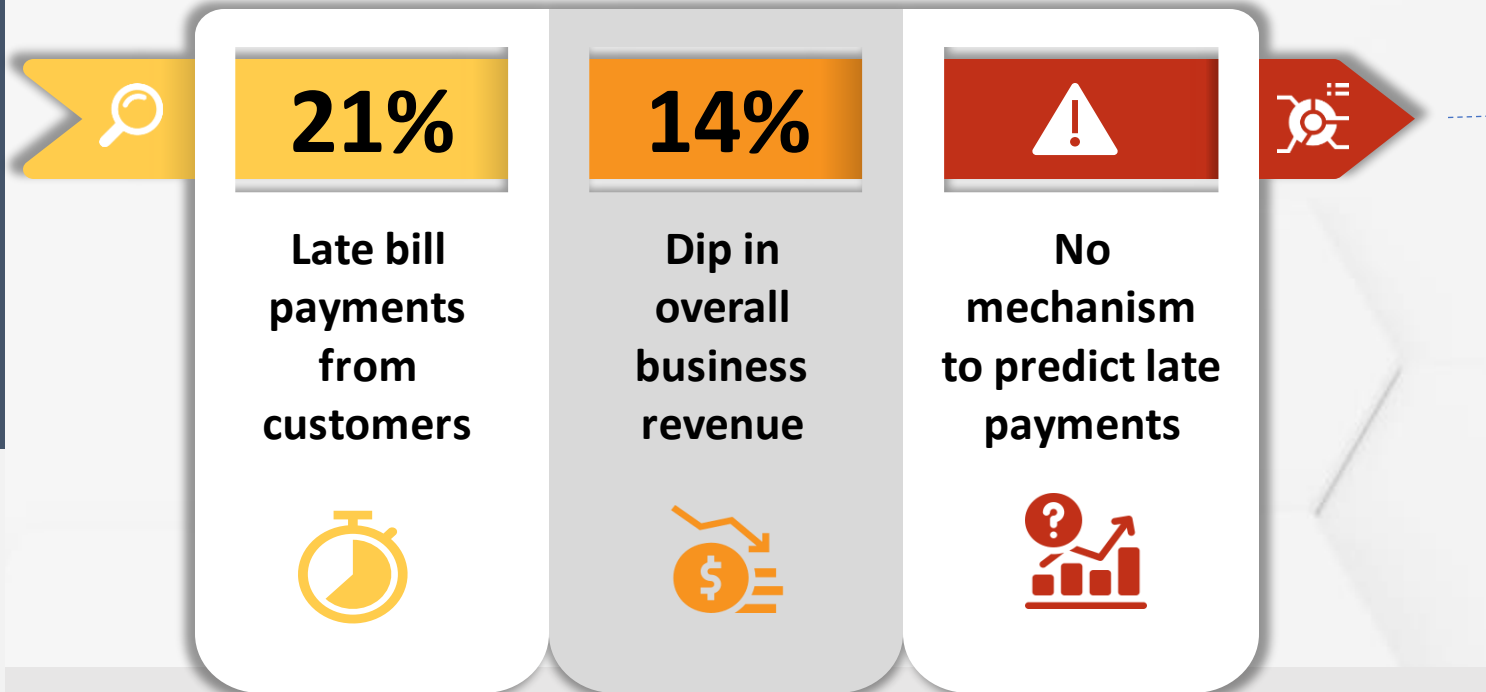


AirLink is a forward-thinking provider of mobile utility solutions, offering innovative services tailored to modern lifestyles. Specializing in mobile and internet utilities, they empower users to seamlessly manage their connectivity needs through an intuitive mobile platform, ensuring reliable access to essential services anytime, anywhere.

UNDERSTANDING
THROUGH A USER STORY

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1: Decide What to Predict



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2:

Get Historical Data in Order

Customer Name	Historical Payment Behavior	Billing Date	Due Date	Amount	Customer Engagement	Payment Method	Geographic Location
Jack Smith	Paid late in the last 3 months	2023-01-05	2023-01-25	\$100.00	Low	Manual	Urban
Sarah Johnson	Paid late in the last 2 months	2023-01-10	2023-01-30	\$85.00	Moderate	Electronic	Suburban
Brian Smith	Paid late in the last 3 months	2023-01-15	2023-02-04	\$120.00	Moderate	Electronic	Rural
Sam Clark	Paid late in the last 1 month	2023-01-20	2023-02-10	\$95.00	High	Manual	Urban
Benny Johnson	Paid late in the last 3 months	2023-01-25	2023-02-15	\$110.00	Low	Electronic	Suburban
Emily Stone	Paid late in the last 2 months	2023-01-30	2023-02-20	\$105.00	Moderate	Manual	Urban
Michael Chang	Never paid late in the last 3 months	2023-02-05	2023-02-25	\$130.00	High	Electronic	Rural
Amanda Rodriguez	Paid late in the last 3 months	2023-02-10	2023-03-02	\$90.00	Low	Manual	Urban
Jason Patel	Paid late in the last 2 months	2023-02-15	2023-03-08	\$115.00	Moderate	Electronic	Suburban
Emily Smith	Paid late in the last 2 months	2023-02-20	2023-03-12	\$100.00	High	Manual	Urban

Predictive Indicators



Missed or Late Payments History

Past instances of missed or late payments on their account, indicating a pattern of delayed payment behavior.



Usage Patterns

Decrease in usage patterns or activity levels, which may signal financial difficulties impacting the ability to pay bills.



Low Engagement

Minimal response to payment reminders, emails, or messages, meaning disengagement or lack of urgency in addressing payment deadlines.



Change in Spend Habits

Significant changes in spending patterns or purchasing behavior - increased reliance on credit cards or reduced signaling potential financial strain.



Financial Instability Indicators

Indications of financial instability - recent job loss, credit score deterioration - impacts the ability to make timely payments.



Partial Payments

Consistent use of partial payments to settle bills, indicating difficulty in meeting full payment obligations on time.



Payment Delays

Delayed payments or outstanding balances in other accounts - utility bills, credit cards, loans, reflecting financial management issues.

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Predictive Late Payment Scores

The screenshot shows a software interface for managing invoices. The main table lists 25 pending invoices with columns for invoice ID, autopay status, amount, status, payment method, and service. To the right, a vertical sidebar displays predictive scores for each invoice, ranging from 85 to 99. The scores are sorted in descending order, with the highest score of 99 at the top and the lowest score of 85 at the bottom. The interface includes a search bar at the top right and a status filter set to 'Pending'.

	INVOICE ...	AUTOP...	INVOICE A...	INVOICE S...	PAYMENT ME...	SERVICE	Score
1	I-1563	<input type="checkbox"/>	536,723	Pending	Wire	Fiber Optic Internet	99
2	I-1925	<input checked="" type="checkbox"/>	582,628	Pending	Wire	Mobile	98
3	I-0070	<input type="checkbox"/>	522,076	Pending	Wire	Fiber Optic Internet	98
4	I-0517	<input checked="" type="checkbox"/>	561,329	Pending	Wire	Landline	97
5	I-1595	<input type="checkbox"/>	54,732	Pending	E-Check	Fiber Optic Internet	96
6	I-1452	<input type="checkbox"/>	536,141	Pending	Wire	Mobile	96
7	I-0986	<input checked="" type="checkbox"/>	57,059	Pending	Wire	Fiber Optic Internet	95
8	I-0873	<input type="checkbox"/>	550,689	Pending	E-Check	Landline	94
9	I-1263	<input checked="" type="checkbox"/>	576,174	Pending	Credit Card	Mobile	94
10	I-1197	<input type="checkbox"/>	583,500	Pending	E-Check	Mobile	94
11	I-0301	<input checked="" type="checkbox"/>	59,382	Pending	Credit Card	Fiber Optic Internet	94
12	I-0076	<input type="checkbox"/>	552,254	Pending	E-Check	Mobile	92
13	I-1963	<input type="checkbox"/>	513,650	Pending	Wire	Fiber Optic Internet	92
14	I-0021	<input type="checkbox"/>	548,980	Pending	Credit Card	Fiber Optic Internet	91
15	I-1901	<input type="checkbox"/>	573,485	Pending	Wire	Mobile	90
16	I-1125	<input type="checkbox"/>	518,018	Pending	E-Check	Mobile	90
17	I-0639	<input type="checkbox"/>	538,328	Pending	Credit Card	Mobile	90
18	I-1204	<input checked="" type="checkbox"/>	592,224	Pending	Credit Card	Mobile	89
19	I-1001	<input checked="" type="checkbox"/>	562,555	Pending	E-Check	Fiber Optic Internet	88
20	I-0328	<input checked="" type="checkbox"/>	569,942	Pending	Credit Card	Fiber Optic Internet	88
21	I-1056	<input type="checkbox"/>	585,763	Pending	E-Check	Fiber Optic Internet	88
22	I-0714	<input type="checkbox"/>	51,319	Pending	Credit Card	Landline	86
23	I-0391	<input type="checkbox"/>	588,948	Pending	E-Check	Mobile	86
24	I-0842	<input type="checkbox"/>	592,743	Pending	Credit Card	Landline	86
25	I-0786	<input checked="" type="checkbox"/>	532,569	Pending	Credit Card	Fiber Optic Internet	86
							85
							85

3: Turn Predictions into Actions



Customer Segmentation Based on Predictive Late Payment Scores

INVOICE #	AUTOPAY	INVOICE A.M.	INVOICE S.	PAYMENT ME.	SERVICE	WILL.	
1	<input type="checkbox"/>	11563	536,723	Pending	Wire	Fiber Optic Internet	99
2	<input type="checkbox"/>	11925	182,828	Pending	Wire	Mobile	98
3	<input type="checkbox"/>	10070	222,076	Pending	Wire	Fiber Optic Internet	98
4	<input type="checkbox"/>	10517	561,329	Pending	Wire	Landline	97
5	<input type="checkbox"/>	11595	34,732	Pending	E-Check	Fiber Optic Internet	96
6	<input type="checkbox"/>	11452	536,141	Pending	Wire	Mobile	96
7	<input checked="" type="checkbox"/>	10986	17,059	Pending	Wire	Fiber Optic Internet	96
8	<input type="checkbox"/>	10873	550,689	Pending	E-Check	Landline	95
9	<input type="checkbox"/>	11263	576,174	Pending	Credit Card	Mobile	94
10	<input type="checkbox"/>	11197	183,500	Pending	E-Check	Mobile	94
11	<input checked="" type="checkbox"/>	10301	59,382	Pending	Credit Card	Fiber Optic Internet	94
12	<input type="checkbox"/>	10078	552,254	Pending	E-Check	Mobile	94
13	<input type="checkbox"/>	11963	113,650	Pending	Wire	Fiber Optic Internet	92
14	<input type="checkbox"/>	10021	548,980	Pending	Credit Card	Fiber Optic Internet	92
15	<input type="checkbox"/>	11901	573,485	Pending	Wire	Mobile	92
16	<input type="checkbox"/>	11125	118,018	Pending	E-Check	Mobile	91
17	<input type="checkbox"/>	10639	338,328	Pending	Credit Card	Mobile	90
18	<input checked="" type="checkbox"/>	11204	192,224	Pending	Credit Card	Mobile	90
19	<input checked="" type="checkbox"/>	11001	562,555	Pending	E-Check	Fiber Optic Internet	89
20	<input checked="" type="checkbox"/>	10328	569,942	Pending	Credit Card	Fiber Optic Internet	88
21	<input type="checkbox"/>	11056	185,783	Pending	E-Check	Fiber Optic Internet	88
22	<input type="checkbox"/>	10714	51,319	Pending	Credit Card	Landline	88
23	<input type="checkbox"/>	10391	188,948	Pending	E-Check	Mobile	86
24	<input type="checkbox"/>	10842	192,743	Pending	Credit Card	Landline	86
25	<input checked="" type="checkbox"/>	10786	532,569	Pending	Credit Card	Fiber Optic Internet	86




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4: Enhanced Actions



Action for
High-Risk Accounts Segment

Einstein Next Best Action 

SWITCH TO AUTO-PAY

THE BEST WAY TO SAVE

Switch to Auto-pay today!
Never miss a payment and save \$600/year

Accept

Reject



Action for Moderate-Risk Accounts Segment

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4: Enhanced Actions

Content Builder Overview Recycle Bin Feedback Alex Smith

Create An Email Generative AI Test

Define Properties Add Content

Content

Block not saved

B I U [Icons] Styles Font

Generate Body Copy

Entries
Use these entries to make your generated body copy as relevant as possible.

* Key Message
For sharing flexible payment options to prevent late payments

Brand Personality
Casual

Sample Body Copy
We are thrilled to offer you flexible payment options to streamline your payment process ...

* Disclaimer
This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for the output when making business decisions. Don't include personally identifiable information like names, phone numbers, or addresses. [Learn more in Salesforce](#)

Get it

Reset

Cancel

Draft Body Copy
To like or dislike a drafted body copy, use thumbs up or thumbs down.

We understand the importance of convenience when it comes to managing your bills. That's why we're thrilled to offer you multiple payment methods to make your experience as seamless as possible.

Embrace the future of payments with mobile payment apps. Pay your bills on the go using popular apps like Apple Pay, Google Pay, or Samsung Pay. Simply add your payment card to your preferred app and tap to pay.

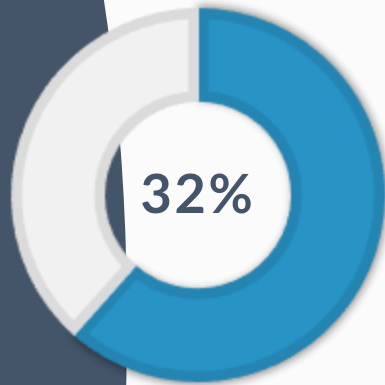
Say goodbye to one-size-fits-all payment schedules. With our customized payment plans, you can create a schedule that works for you, allowing you to manage your payments with confidence and ease.

RESULTS

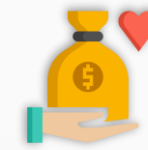
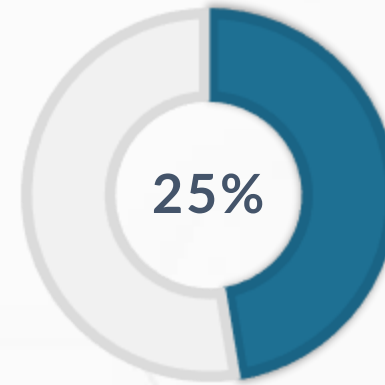
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Achieves On-Time Bill Payments

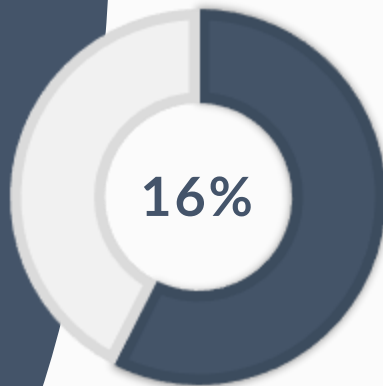
Leveraging the Power of AI



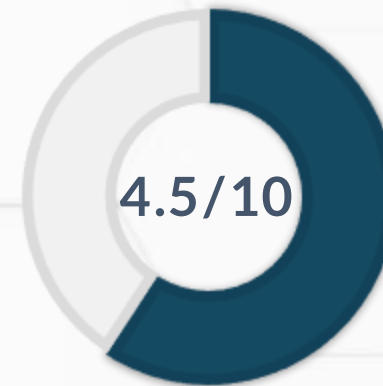
Decrease
In Late Payments



Increase
In On-Time Payments



Growth
In Revenue
attributed to on-time bill payments



Increase
In Customer Satisfaction Score

HAVE ANY

QUESTIONS?



Contact Us

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