

# WhatsApp in FinTech

Design exclusive business messaging solution for financial service providers that complies with industry regulations



# Sanuker - Business Messaging Expert



"We design unique business messaging solution for financial service providers"

300+ enterprise chatbot projects & 1,500 running chatbot licenses

HQ in Hong Kong, offices in Greater China, Spain and Mexico

Winner from MARKies & Marketing Excellence, APAC CIO 2021 cover startup

60+ chatbot designers with 5+ years of experience

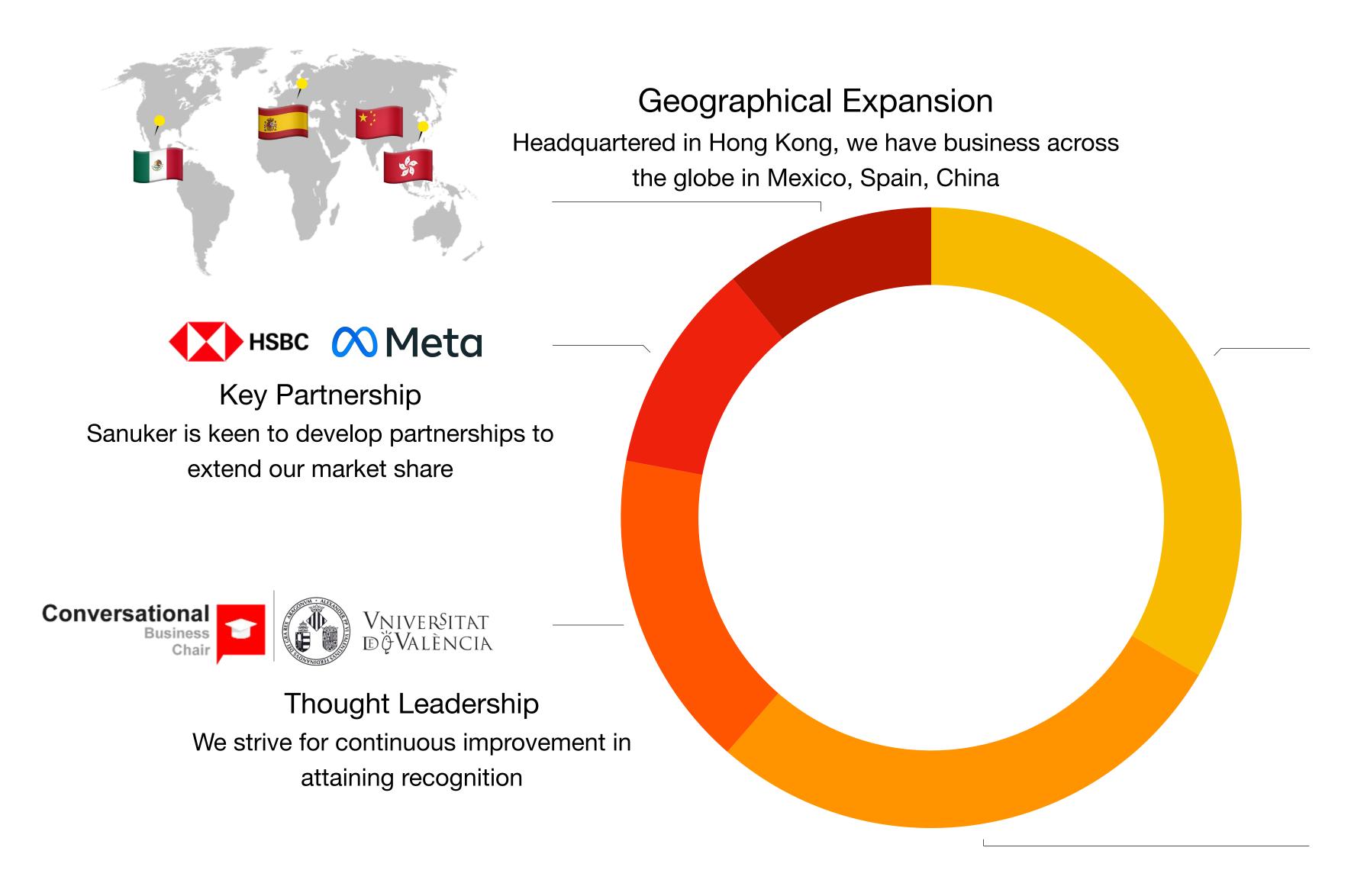


Meta's business partner

HSBC Business Go Partner

## **Business messaging roadmap**







Business Messaging Consultancy

We provide professional business messaging consultancy to deliver world-class services



Omni-Channel Dialogue Builder
We utilize the omni-channel dialogue
builder in creating interactive chatbot
experiences

## We position for client's success



#### Marketing Awards



Marketing Excellence Awards 2018

**Excellence in Gaming** 

IWC Schaffhausen 150 Chatbot Game



Marketing Excellence Awards 2018 Excellence in Mobile

DBS iWealth App

Marketing



MARKies Awards 2019 Best Idea - Digital

DBS Live More, Bank Less Campaign



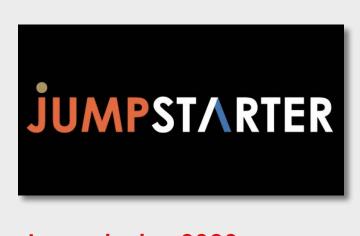
MARKies Awards 2021

Best Idea - Gaming

Maxim's Cakes Monopoly Mission MARKies Awards 2021
Best Use of Gaming

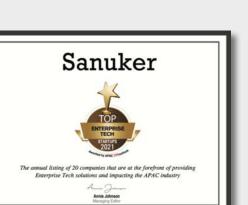
Maxim's Cakes Monopoly Mission

#### Top Startups



Jumpstarter 2020
30 Shortlisted Startups

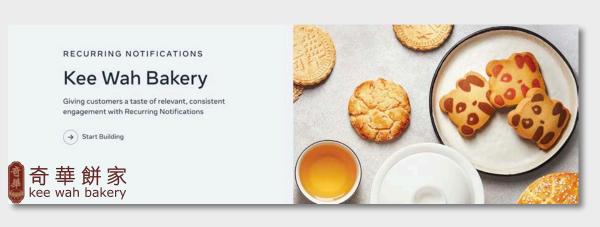




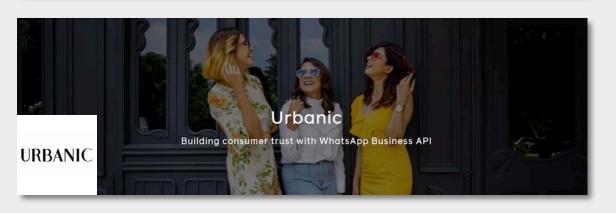
APAC CIO Outlook Magazine Top 20 Enterprise Tech Startups Award

The annual listing of 20 companies that are at the forefront of providing Enterprise Tech solution and impacting the APAC industry

#### Meta Featured Success Stories















# Why WhatsApp in financial institutions?

# WhatsApp, the best platform to conduct business



2018

**Launch of WhatsApp Business Platform** 



#### 2020

Over 60% of young adults

between 18 and 30 years old prefer to talk to their bankers, brokers or agents via WhatsApp

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#### 2022

Launch of The Cloud API, by Meta & native payment



Launch of Meta Cloud API and the possibility of native payment on WhatsApp in selected markets



#### 2019

**300k+** businesses joined the platform

2021

### Over US\$1B+

investment has been made to entrepreneurs who aspire to provide financial services on WhatsApp

6

# Your customers are on WhatsApp. Start conversations That help drive conversions



WhatsApp Business Platform helps **banks**, **credit providers**, and **FinTechs** give users an easier way to access financial services.



# Help reach more customers

by adding touchpoints to the customer journey.



# Help improve customer support

by reducing call center volume.



### Help increase customer loyalty

by making and keeping your customers happy.

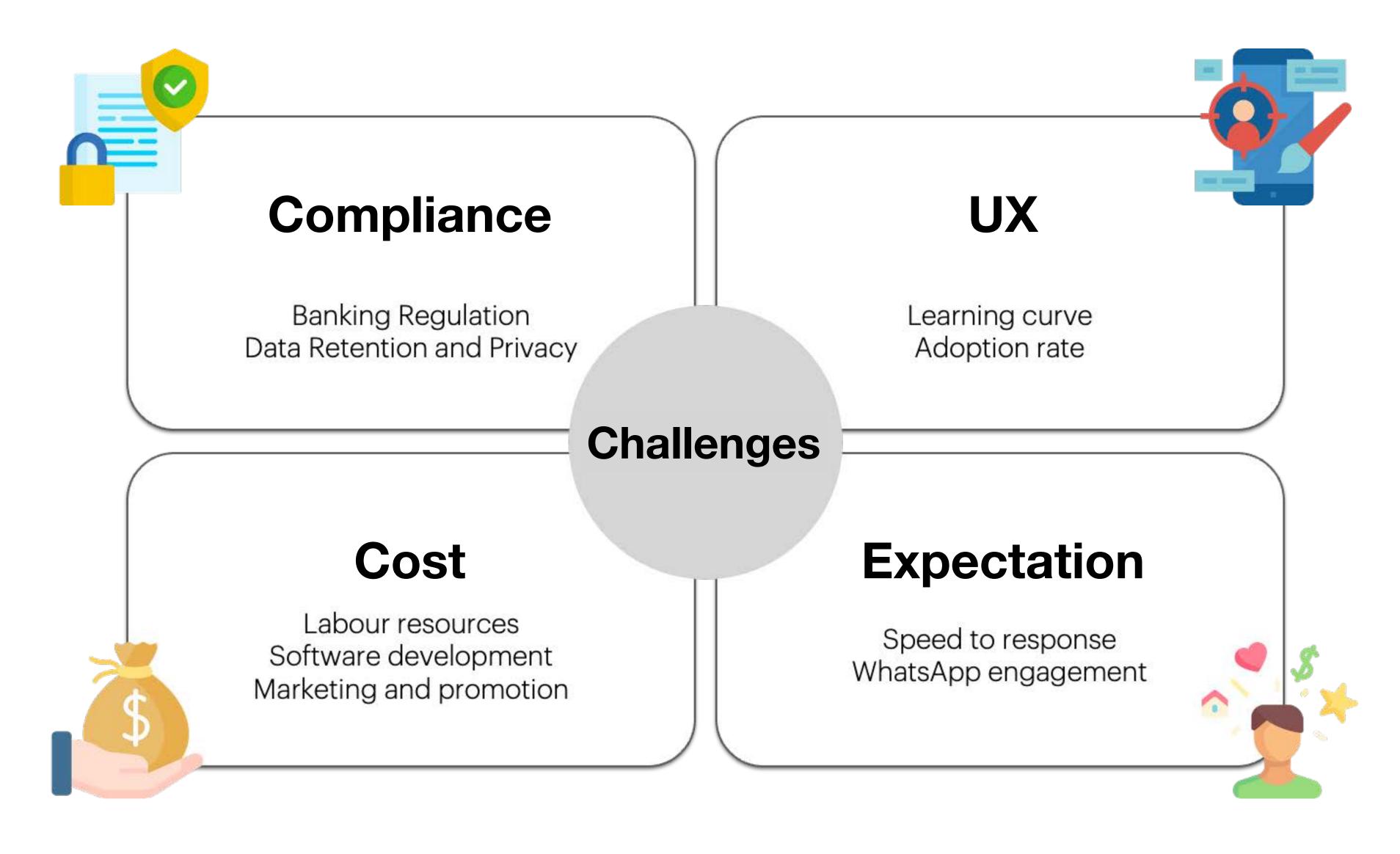


+30%

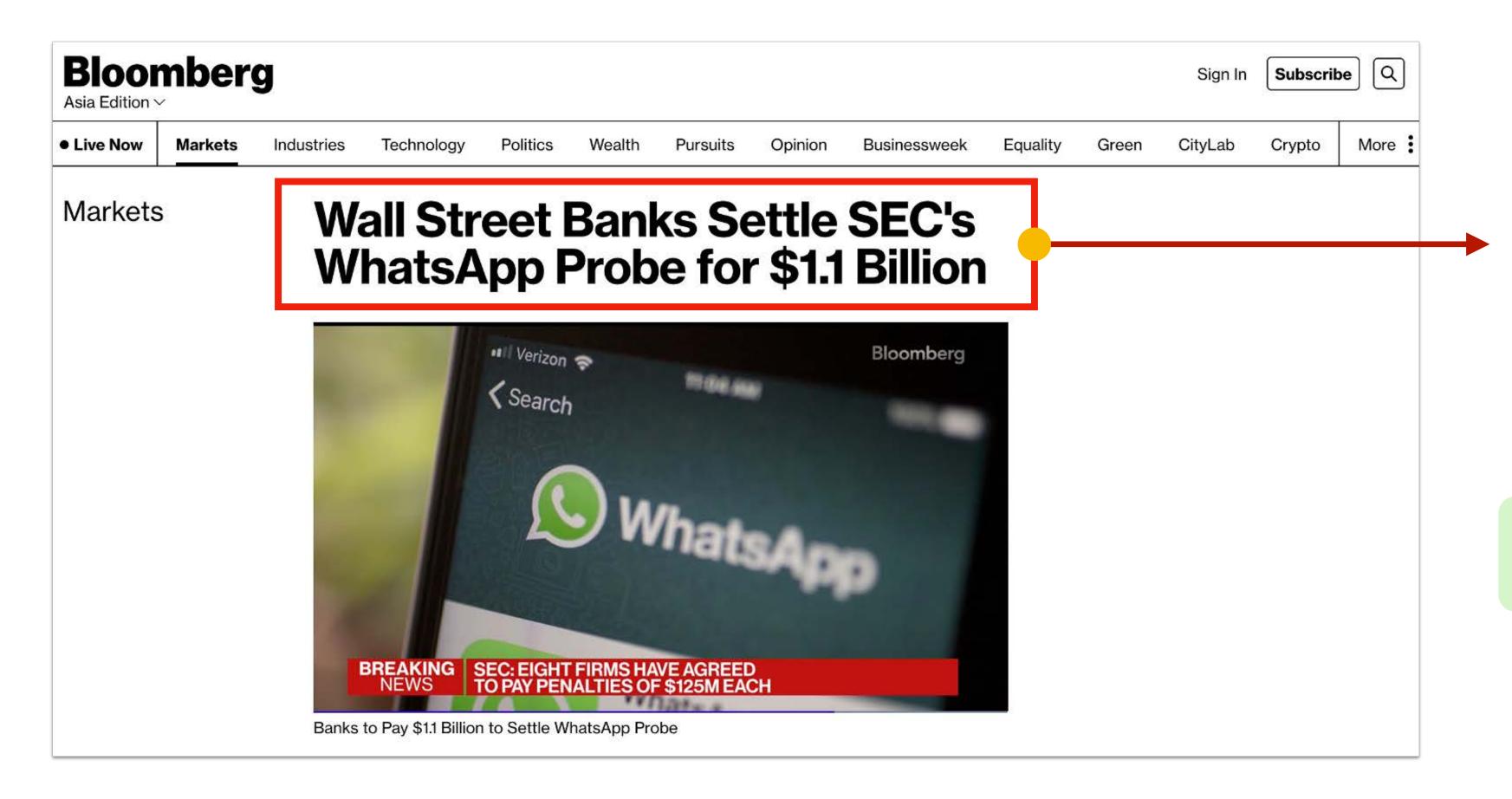
increase in new accounts opened for LATAM financial service organizations using the WhatsApp Business Platform

# **But WhatsApp adoption in financial institution is NOT EASY**









To meet up with the compliance in financial institutions, all conversations among company's staffs and clients on WhatApp need to be monitored.

Hence, we need WhatsApp Business API.



WhatsApp Business API



# Reach customers Securely & with compliance on WhatsApp Business API

# Encryption



Every WhatsApp message, is protected by the same industry-leading, signal encryption protocol that protects messages from before they're sent until they're delivered to the intended recipient.

# Two-step verification



Users can require any attempt to register a phone number on WhatsApp to also enter a six-digit PIN that the user created when enabling two-step verification. They can also enter their email address, allowing WhatsApp to email a reset link in case the user ever forgets their PIN, which further safeguards the account.

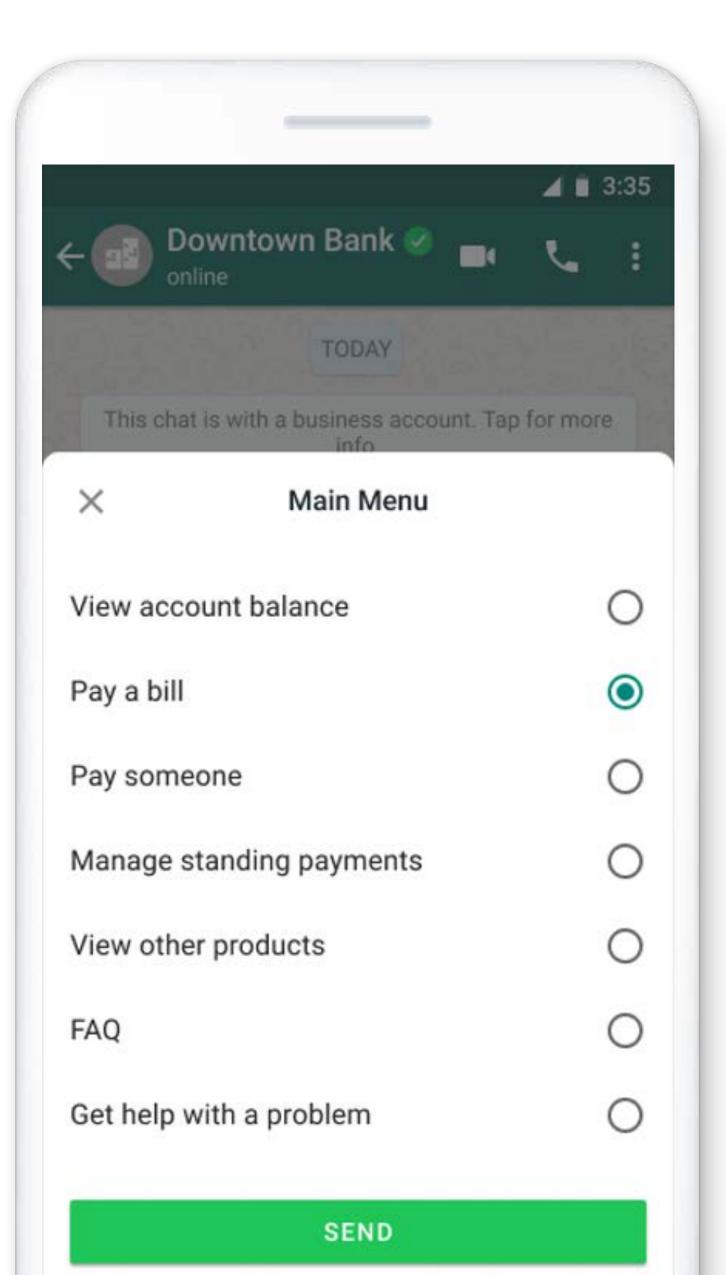
# Data privacy regulatory compliance



WhatsApp provides transparency on security and compliance practices — including SOC 2, regular penetration tests, and the Cloud Security Alliance Consensus Assessments Initiative Questionnaire. It is also committed to complying with data protection laws and regulatory requirements, as well as industry best practices.



# Financial service use cases with WhatsApp Business Platform



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## Use cases along customer journey

#### Research



#### Bonus points

Offer bonus points toward a purchase when customers sign up for a new credit card.



#### Interest rate updates

Inform customers about reduced interest rates to boost new loan applications.



#### Special promos

Create personalized offers to upsell customers on partner programs.

#### **Transactions**



#### Contact information updates

Make it easy for customers to update their account information.



#### Funds transfers

 Help customers stay on top of their finances with account alerts and simple transaction options.



#### New account openings

Reach out to customers to open a new account as a special product offer.

#### **Customer support**



#### Transaction verifications

Verify recent transactions and reduce false flags on fraudulent transactions.



#### Transaction dispute resolutions

Provide timely updates on recentlyflagged charges to improve customer satisfaction.



#### Missed payments

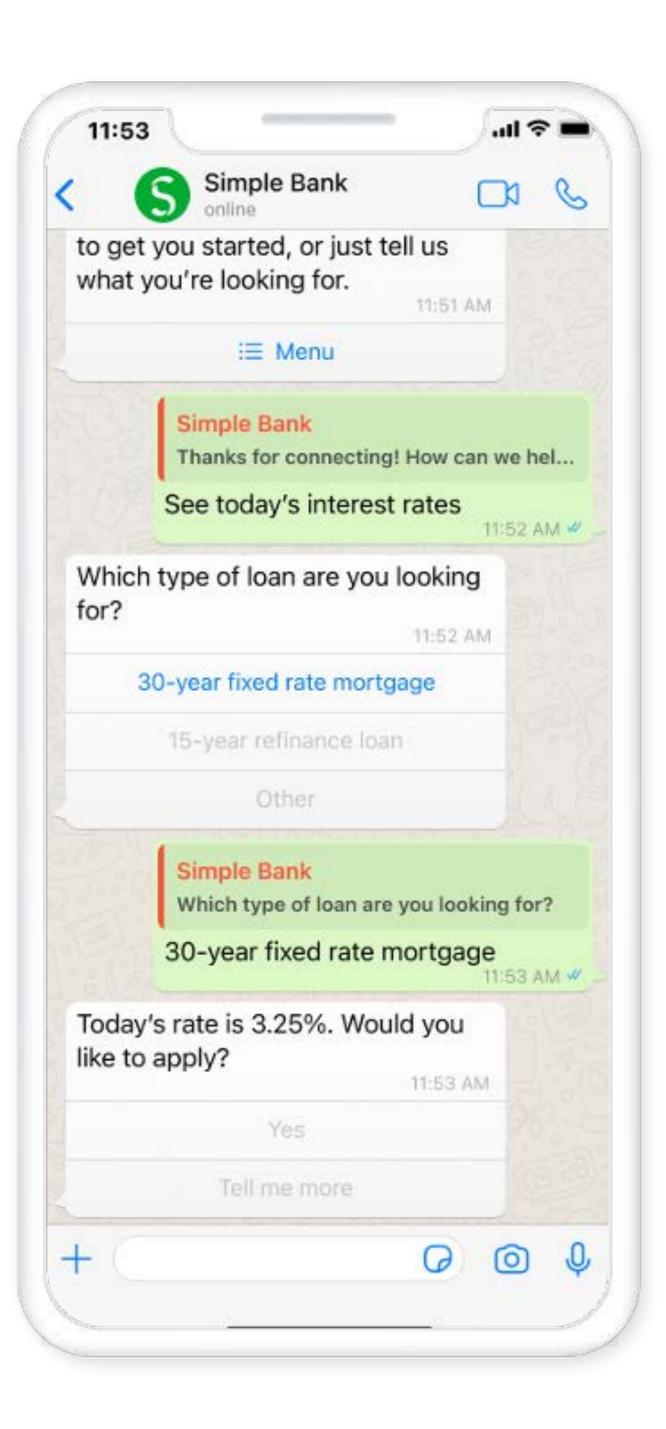
Make it easy for customers to keep their accounts in good standing with late payment alerts.

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# Use case: 24/7 Automated Response

- Find a branch or ATM
- Make an appointment with a financial advisor
- Review interest rates
- Research loan requirements
- Research checking and savings account options
- Inquire about fees





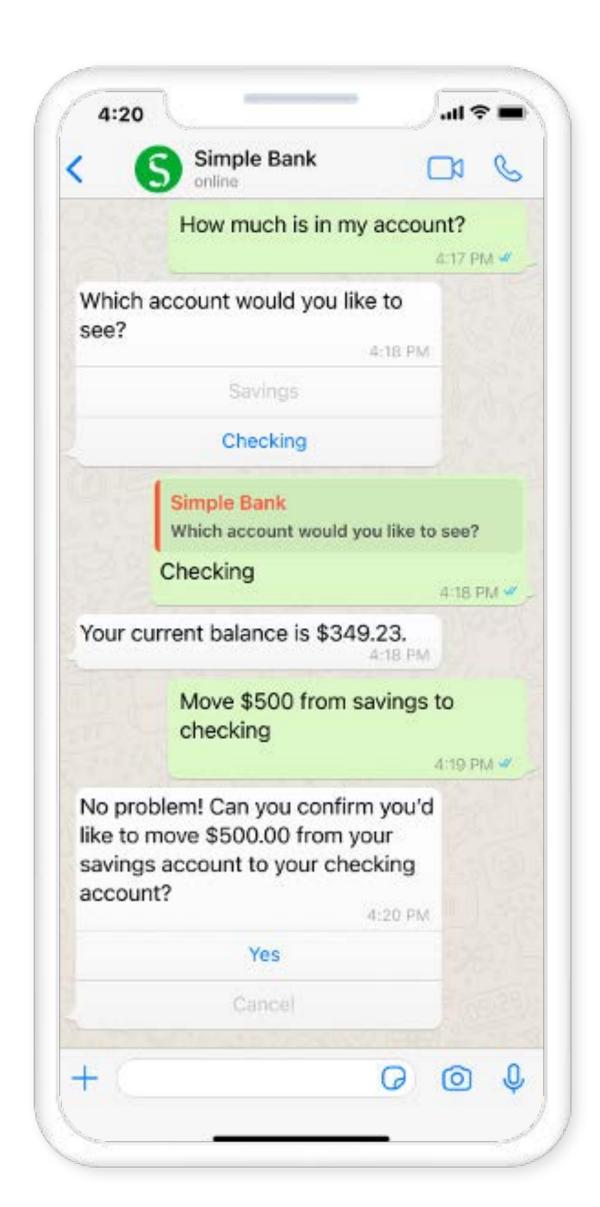


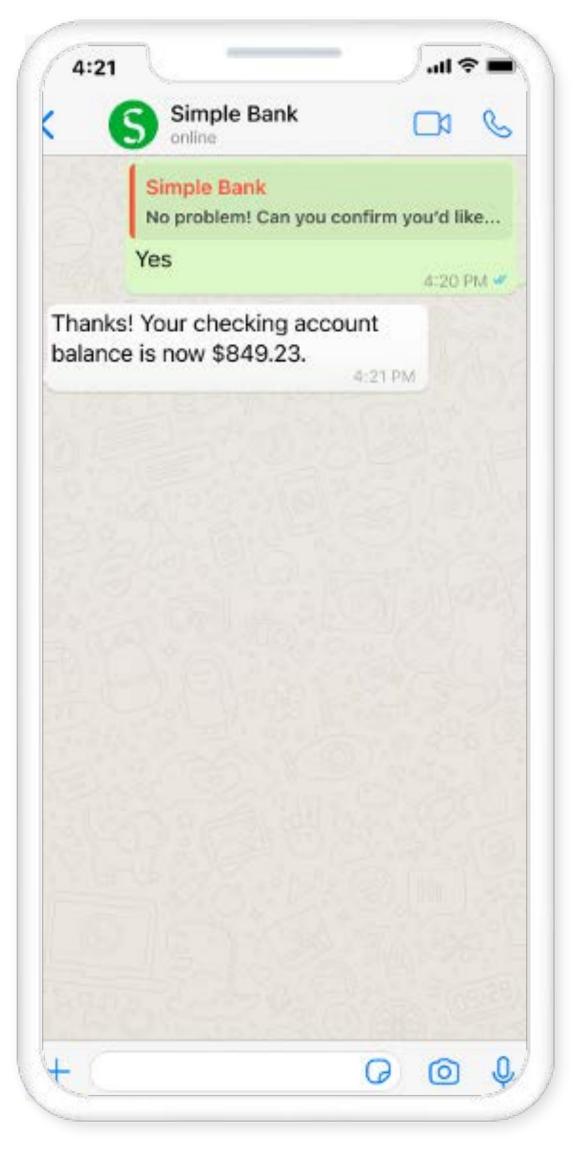
#### **Transaction**

### Use case:

# Transferring funds between accounts

- Open an account
- Apply for credit
- Pay a bill
- Make a loan payment
- Check account balance
- Transfer funds





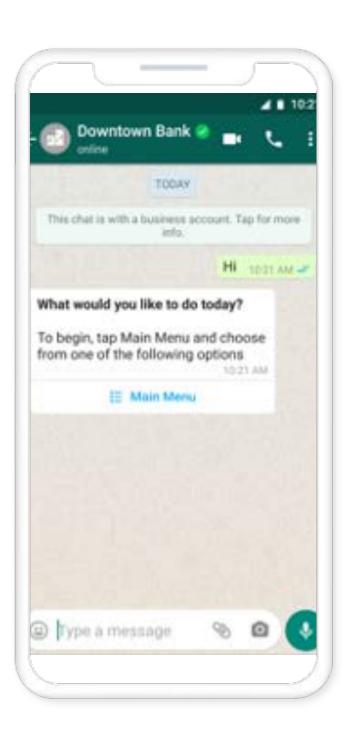


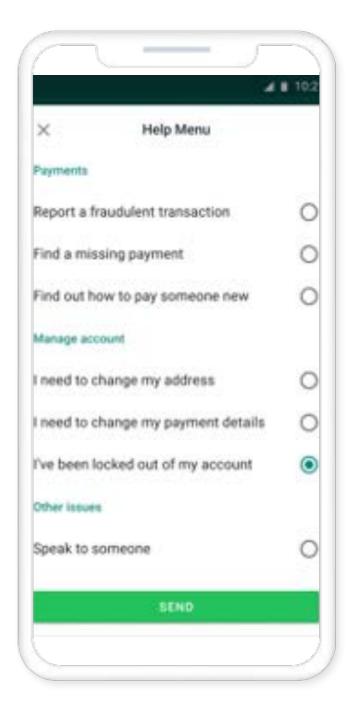
#### **Customer Service**

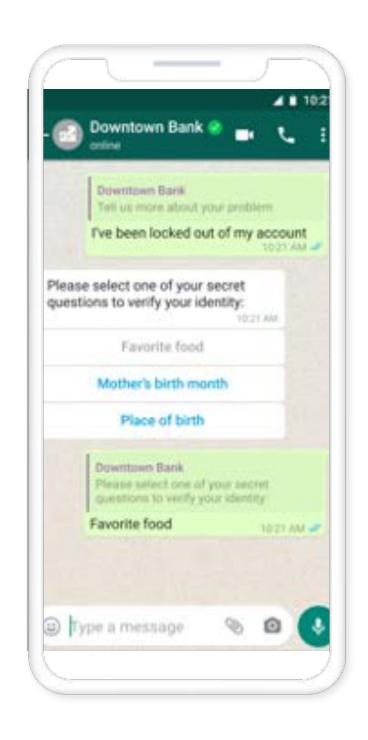
### Use case:

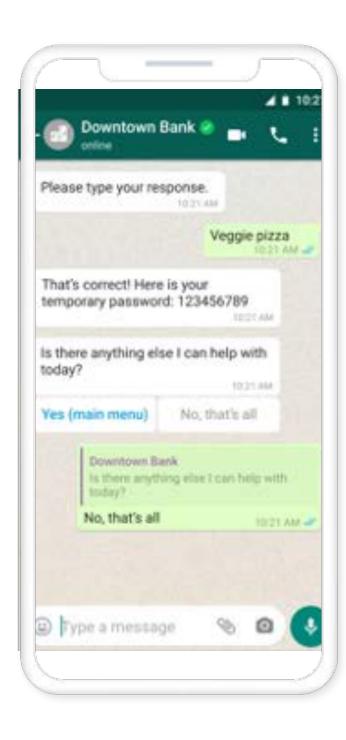
## Resetting a password

- Change a password
- Update contact information
- Change payment details
- Submit a complanit
- Connect with the right department
- Report fraud
- Report a lost or stolen card
- Place a travel alert









### **Our clients**

































More to come!



## Learnings





### Empower your Business with Conversations

People want to message with business across customer journey.

**Download our free whitepaper** filling the form bellow to discover how to do it with chatbots.

Download >



#### Featured Chatbot Success Stories September 2021

In this ebook we intend to show you some of our best success stories so that you can see the full potential that a chatbot can have for your business to get inspired.

Download >



# Managing customer conversations at scale with the WhatsApp Business API

Meet your customers where they're at with Sanuker and an API built for medium and large businesses.

Download >



#### Benefits of upgrading your Business Website with Chat Plugin

In this infographic we discuss the many benefits that the Facebook Chat Plugin has. We go over relevant data and statistics of businesses that already incorporate the plugin in their strategy.

Download >



#### New marketing in the new normal the next chapter of Digital Marketing

Alienating social distancing and antiepidemic measures for countering pandemics are hampering relationshipbuilding between enterprises and customers

Download >

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