

Member service chatbot and inquiry routing

Automated member service chatbot that handles inquiries, accesses member data, and routes complex issues to appropriate human representatives. Improves member satisfaction while reducing call center workload.

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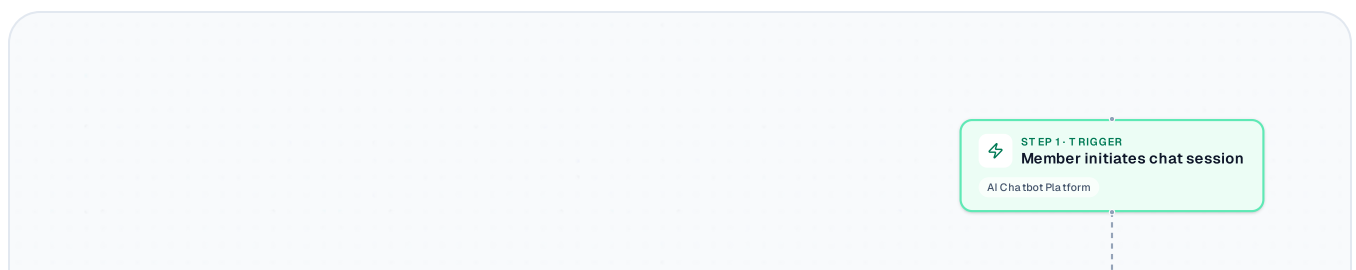


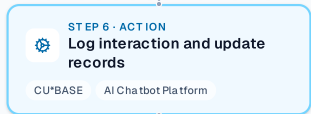
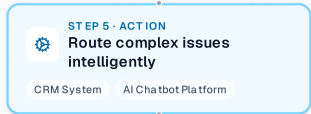
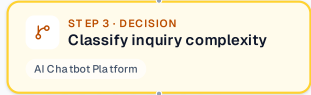
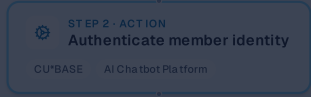
WORKFLOW TRIGGER

Member initiates chat conversation through credit union website or mobile app

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Member initiates chat session

Member starts conversation through website widget or mobile app chat interface. System captures member session and initial inquiry.

AI Chatbot Platform

2

 ACTION

Authenticate member identity

Chatbot prompts for member number and security questions, then validates credentials against core banking system. Retrieves member profile and account access permissions.

CU*BASE

AI Chatbot Platform

3

 DECISION

Classify inquiry complexity

AI analyzes member's question using natural language processing to determine if it's a simple FAQ, account inquiry, or complex issue requiring human intervention.

AI Chatbot Platform

4

Process simple inquiries automatically

For routine questions, chatbot provides instant responses about account balances, transaction history, branch hours, or loan rates using pre-built knowledge base.

CU*BASE

AI Chatbot Platform

5

ACTION

Route complex issues intelligently

System determines appropriate department (loans, member services, or compliance) and creates support ticket with conversation context and member information.

CRM System

AI Chatbot Platform

6

ACTION

Log interaction and update records

All chat interactions are recorded in member's service history with inquiry type, resolution method, and satisfaction rating for future reference.

CU*BASE

AI Chatbot Platform

7

OUT PUT

Deliver resolution confirmation

Member receives immediate answer for simple inquiries or confirmation of ticket creation with estimated response time for complex issues.

AI Chatbot Platform



Outputs

- Automated responses to routine member inquiries
- Prioritized support tickets for complex issues
- Updated member service interaction history



Key Metrics

- First contact resolution rate
- Average response time
- Member satisfaction scores



Tools & Integrations

- AI Chatbot Platform
- CU*BASE
- CRM System

AI Business OS

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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