



Ready

Set

Go!



Participants



FI Project Team



FI Brand & Marketing



Kasisto Delivery Manager



Kasisto CSM

Days 1-10

Outcomes

- ✓ Your IDA's persona is coming to life.
- ✓ Your key stakeholders are engaged and committed to launch.
- ✓ Your team is familiar with the KAI platform and your Kasisto portal.

Implementation Steps

- Determine IDA Persona, Tone, and Voice
- Engage Key Stakeholders
- Review and Set Up Content

Days 11-20

Outcomes

- ✓ Your responses for all desired intents are fully personalized.
- ✓ You've sought out and built expert banking knowledge into your IDA.
- ✓ You've finalized your testing and launch plan.

Implementation Steps

- Create Intent List
- Engage the Experts
- Prep Launch Plan

Days 21-30

Outcomes

- ✓ You've QA'd and tested your IDA and made any personality refinements.
- ✓ You've welcomed your IDA and celebrated its launch.

Implementation Steps

- QA and Test IDA
- Introduce IDA to Team
- Go Live with IDA



Hello, I'm your virtual best banker!

How can I help you today?



Your IDA is live!