

Secure, scalable, compliant CX

Empower your teams to deliver low-risk, compliant, and personalized support, from KYC to claims, transactions, and beyond, with a platform built for the complexity of financial services.

The state of finance CX

CX is a top priority



AI Advantage Transforms Performance
AI-leading insurers achieved over 6x the shareholder returns of slower adopters.

McKinsey
& Company

Customer satisfaction is low



Fewer than half of consumers are fully satisfied with the CX provided by their banks, insurers or wealth-management firms.



Channel friction undermines experience



Nearly 47% of customers say they still have to repeat themselves across channels when dealing with their financial institution.



“AI for Reps makes it easy for our team to respond more accurately. Everything they need is right in chat, no more switching platforms, and they love using it.”

Maria Jimena Cerda, Operations Manager at Aplazo

Turning CX into a competitive advantage

With trust and speed driving every interaction, leading financial brands are turning customer service into a competitive edge, scaling compliant, always-on support without growing headcount. Here's how Kin Insurance does it.

kin.

Unifying CX for fewer compliance-relevant escalations

Kin Insurance, a digital home insurer built to serve customers in catastrophe-prone areas, needed to deliver fast, reliable service while managing high claim volumes and compliance requirements. Disconnected systems made it hard for agents to access policy details and past interactions quickly.

The Fix: Kin used Kustomer's Unified Timeline to bring together every policy, message, and claim interaction in one view. Agents gained real-time visibility across SMS, chat, email, and policy data, helping them resolve issues faster with complete customer context.

Fast

Faster response and resolution times

Visible

Improved visibility across team

Efficient

Higher agent efficiency and CSAT

Solving finance CX challenges that leaders know all too well

Challenge	Kustomer Solution
Fragmented systems slow response time	Faster support, fewer tabs. Unified Timeline + iFrames surface everything from sales CRMs to fraud tools.
Compliance risk from shared data	Stay compliant with confidence. Role-Based Permissions + Audit Logs control access and track changes.
Manual triage & repetitive tasks	Do more with less effort. Automated Workflows + AI Agents handle routing, tagging, and follow-ups.
Cross-team coordination delays	Get teams in sync instantly. Collaborative Workspaces + Smart Routing unite Fraud, KYC, and Care.

Maintaining compliance without slowing down operations	Stay audit-ready and compliant. Kustomer automatically logs every action, message, and workflow.
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How leading finance brands scale securely with Kustomer



kin.

Reduced response times and improved visibility across channels.



aplazo

98% of support conversations are handled autonomously with AI.