

Freshdesk – the modern customer service solution for the banking and finance industry



Trust and reliability are everything in the world of finance. No customer wants to deal with slow responses or inefficient financial or insurance support.

[Freshdesk](#) empowers your business with features that make support exceptional. Omnichannel ensures customers can reach you anywhere, AI agents resolve repeat queries quickly, and automated workflows assign the right team to the right query. Fast, secure, and seamless, just what the BFSI world needs.

Top customer requirements to meet in the BFSI sector

[Based on PWC's 2024 "Shifting Horizons: Banking Readiness for 2030" study](#)



Ease of banking

Customers expect mobile-first banking experiences, including AI chatbots and WhatsApp banking features.



24*7 omnichannel presence

Digital-native customers demand consistent, always-on support across channels.



Hyper-personalization

Customers expect their data to be used to deliver personalized experiences and tailored services.



Financial wellness and holistic support

Customers value support beyond transactions, including financial planning tools and proactive engagement. –

Build trust and loyalty in every interaction with Freshdesk

1. In app and omnichannel support for seamless banking

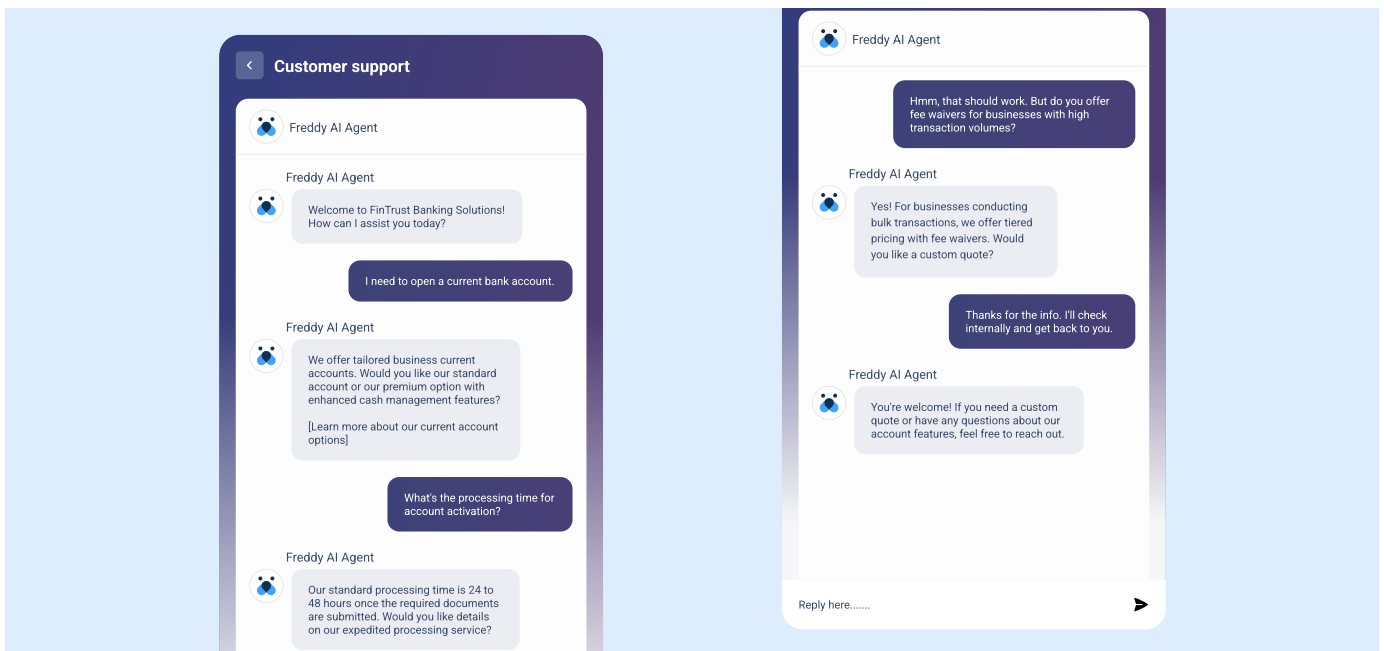
Freshdesk integrates directly into mobile banking apps to offer instant in-app support. Financial institutions can also connect chat, phone, website, WhatsApp, Facebook or any social media to deliver round-the-clock service.

With Freddy AI Agent deployed across all channels, top financial services teams are resolving queries in just **1 minute 33 seconds***, setting the pace for modern CX.

2. Always-available service, without always-on staffing

Freshdesk ensures 24/7/365 availability across channels without overloading your team. Freddy AI Agent handles FAQs, account queries, and policy details instantly, escalating only when necessary.

Banks and insurers using Freddy AI Agent deflect over **56%*** of incoming conversations and maintain a **handle rate of 44%***, keeping service levels high and costs low.



3. Personalized, context-rich financial guidance

With unified customer records, CRM integrations, and real-time data, Freshdesk equips agents to provide hyper-personalized support, be it custom credit limits or the right insurance bundle.

This access to rich context enables leading teams to achieve **90%* CSAT** and respond to emails in just **5.4* minutes**.

4. AI-powered productivity that scales with you

Freddy AI Copilot helps agents summarize issues, find solutions, and write clear, empathetic responses, perfect for regulatory and sensitive financial conversations.

Top BFSI teams using Freddy AI Copilot reduce response times by **60.78%***, enabling faster resolutions while maintaining compliance and customer satisfaction.

5. Proactive engagement that strengthens relationships

Freshdesk workflows automate reminders for payment due dates, policy renewals, and fraud alerts. This proactive approach improves financial wellness while reducing inbound queries.

Freshdesk users in BFSI hit **95.8%* First Contact Resolution in chat** and maintain **97%* SLA compliance** in ticketing, far ahead of peers.

* [Freshworks Customer Service Benchmark Report 2025](#)



"We are getting rave reviews, we hear that in the sales process, our support is a game-changer and a differentiator in bringing in new customers and keeping our existing ones. We're gaining an intimate understanding of our organization and developing a new vision for how to serve our customers in an AI-powered future."



Heide Antholz
SVP of Professional Services

[Read the full story here](#)

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peach
payments

Freshdesk helps financial institutions set the CX benchmark

[Our 2025 Customer Service Benchmark Report](#) reveals how the trendsetters of the BFSI Industry are redefining customer support.

Curious how your team stacks up? Compare your current support performance with the industry's best below.

Metric	Trendsetters (Ticketing)	Trendsetters (Chat)
First Response Time	3 mins 25 secs	12 secs
Resolution Time	34 mins 18 secs	1 min 33 secs
CSAT	90.0%	97.49%
First Contact Resolution	76.5%	95.83%
Response SLA %	29%	97.3%

Want to match the trust that top banks deliver? [Start with Freshdesk.](#)

FAQs

1. How can I upload and manage internal policies in Freshdesk for quick agent reference?

Freshdesk's internal knowledge base allows you to upload policies and procedures, giving agents quick access to essential information when responding to customer queries.

2. What is the implementation process for Freshdesk in the BFSI sector?

Freshdesk is easy to implement, with a clear process involving assessment, customization, integration with existing systems, training, and ongoing support.

3. What are the pricing options for Freshdesk in the BFSI industry?

Freshdesk offers several pricing tiers, starting with a free plan and scaling up to more advanced options with additional features based on business size and requirements.

[Sign up for free trial](#)

We are always there to help you with your queries. If in doubt, feel free to reach out to sales@freshworks.com

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