

AI Customer Service Chatbot for a Community Bank, Grounded in the Bank's Own Published Product and Account Material

A community bank has refined its assistant 224 times, and counting

One assistant on a community bank's website for twenty-eight months, grounded in the bank's own published material, carrying three agentic actions and answering on 319 of the last 365 days.

3,723

Questions asked, raw count

319

Days carrying a question in the last 365

224

Revisions to the assistant's wording, none needing a redeploy

3

Agentic actions running on every answer

THE CHALLENGE

The products move, the questions move, and the answers have to move with them

A customer working out on a Sunday whether a particular deposit account suits a seasonal business. A branch officer who fields the same handful of product questions between appointments and would rather spend that time on the appointments. A marketing lead who owns the website, reads what the assistant tells people, and wants it to sound like the bank on every answer rather than most of them.

Rates move. Products get added and retired. The phrasing that worked last quarter starts to read oddly against a page that has since been rewritten. A bank of this size cannot run a release process to fix a sentence, so the question at purchase was a practical one: when somebody reads the assistant's answer and knows a better way to say it, how long does it take to change, and who has to be involved.

WHAT GOT BUILT

One assistant, grounded in the published site.

The bank's own product and account material, crawled as it stands and recrawled as it changes.

Citations on the answer.

A visitor can see which page a statement about a product came from.

Wording the bank owns.

The instructions were written in-house and have been revised 224 times, each edit landing on the assistant already answering.

Three agentic actions.

Page awareness, conversion and lead capture, so a good answer can end somewhere other than the end of a paragraph.

THE REQUIREMENTS

Five things the bank would not compromise on

A bank this size buys differently from a large one. The question is rarely whether a capability is impressive on the day of the demonstration. It is what the thing will be like to live with in the second year.

- 1 Answers bounded by what the bank publishes.
- 2 Wording the bank could change itself.
- 3 One source of truth.
- 4 A reply that can do something.
- 5 No customer data in scope.

SWORN TO SECRECY

A community bank in the southeastern United States serving commercial and retail customers, with roughly one hundred and fifty staff. Shared anonymously. Every figure comes directly from the bank's own deployment and is scoped to its single assistant.

AT A GLANCE

INDUSTRY

Community banking. A commercial and retail bank in the southeastern United States.

DEPLOYMENT

One assistant, in production continuously for twenty-eight months and revised 224 times.

ACCESS

Public, on the bank's website.

HOW IT WAS BUILT

Pointed at the live site, then improved a line at a time

Start from the published site.

The material the bank already keeps accurate became the corpus, which makes accuracy a by-product of work already being done.

Read the answers and keep editing.

224 revisions across the deployment's life, roughly one every four days, each landing without a rebuild.

Write the instructions in-house.

The bank's own people wrote how the assistant should answer, rather than accepting a generic persona.

Add capability as the case for it appeared.

The actions were not all switched on at launch. The third went on in the most recent stretch of the record.

EDITABLE WORDING, THE CAPABILITY THAT DECIDED IT

Two hundred and twenty-four revisions, and not one of them was a deployment

How an assistant answers is copy, and copy gets better by being edited by someone who reads it. This bank has revised its assistant's instructions 224 times across twenty-eight months, one revision every four days on average, every one of them landing on the assistant already answering visitors. Where changing an answer means a ticket, a sprint or a vendor, the wording stops improving on the day the project ends. Here it is a text field the marketing lead can open, which is why the answers have kept pace with a bank that has not stood still either.

THE RECORD

Twenty-eight months of compounding small improvements

WHAT THE NUMBERS SAY

The two day counts tell the story between them. Across the whole deployment the assistant has answered on 659 of 852 days, and in the most recent year it has answered on 319 of 365. It found its footing and then became part of the furniture. Set the 224 revisions beside that and the shape is clear. The bank runs this assistant rather than hosting it.

WHY CUSTOMGPT.AI CAME OUT ON TOP

Editing is not deploying. 224 changes to what the assistant says, none of which needed a rebuild, a reload or anyone outside the bank.

The corpus follows the site. Grounding in the live published material means the bank updates the assistant every time it updates a page.

Capability could be added later. Three actions now run on the answer, put in as the case for each one appeared rather than all at launch.

WHAT THIS MEANS FOR YOU

Ask how a bad answer gets fixed, and who has to be in the room

Put a number on the edit loop. Find out what happens between someone reading a poor answer and that answer changing. If the path runs through a queue, the wording will stop improving the month after launch.

Ground it in what you already publish. Anything that needs its own copy of your content has quietly added a maintenance task to somebody's week, and that copy is the one that will go stale.

LOOKING AHEAD

The Sunday customer gets an answer from the bank's own material and can see the page it came from. The branch officer keeps the appointments and loses the repetition. The marketing lead reads an answer she does not like, rewrites it before lunch, and adds one more to the 224.

ABOUT CUSTOMGPT.AI

CustomGPT.ai is a no-code platform for building AI agents that answer only from an organization's own content: documents, websites and knowledge bases. Every answer is grounded in verified sources with citations, and the platform is SOC 2 Type 2 and GDPR compliant. Organizations use it for customer support, internal knowledge search, website chat and more, across help centers, apps and the API.