

AI Customer Service Chatbot for a Savings Bank,
Grounded in the Bank's Own Deposit and Lending Material

A savings bank changed what its assistant does without ever taking it down

One assistant on a savings bank's website, grounded in the bank's own published material, rewritten a hundred and twenty-seven times and given new capabilities months into its life, on the deployment already carrying traffic.

2,240

Questions asked, raw count

127

Revisions to the assistant's
instructions since launch

2

Agentic actions added to a live
assistant, months after launch

0

Rebuilds. The assistant running
now is the one that launched

THE CHALLENGE

A deposit account is a set of terms, and an approximate answer is a wrong one

A first-time buyer comparing notice periods at eleven at night, working out which account will hold a deposit for eight months without a penalty. A teller who can settle that in fifteen seconds, but only between nine and four, and only for whoever is standing in front of her. A marketing manager who can see in the analytics exactly which product page people give up on, and who has never had anything to put on it that answers back.

A savings bank sells terms. Notice periods, penalty conditions, minimum balances and rate tiers are the product, and they differ between accounts that look identical from the outside. An assistant that answers approximately, or that answers about savings accounts in general, is worse than no assistant at all, because it speaks in the bank's voice while saying something the bank never committed to.

WHAT GOT BUILT

Grounded in the bank's own site.

The corpus is the bank's published deposit and lending material, crawled as it stands rather than rewritten for the assistant.

Citations on the answer.

A visitor can see which page an answer came from, which matters when the answer is a set of terms.

A declared support role.

The assistant is configured as customer support rather than left generic, and its instructions were written by the bank.

Two agentic actions, added later.

Page awareness and lead capture were switched on months after launch, on the assistant already carrying traffic.

THE REQUIREMENTS

Five things a savings bank would not compromise on

The product here is the terms. A deposit account is a set of conditions the bank has committed to in writing, and an answer that paraphrases those conditions loosely is a liability wearing the bank's name.

- 1 Specific, never approximate.
- 2 Bounded by what the bank publishes.
- 3 Changeable after it is live.
- 4 Able to grow new capabilities later.
- 5 No account system in scope.

SWORN TO SECRECY

A retail savings bank in the northeastern United States, deposit- and mortgage-led, with roughly one hundred and thirty staff. Shared anonymously. Every figure comes directly from the bank's own deployment and is scoped to the single live assistant on its website.

AT A GLANCE

INDUSTRY Retail savings banking. A deposit- and mortgage-led bank in the northeastern United States.	DEPLOYMENT One live assistant, in production for thirteen months and reconfigured in place partway through.	ACCESS Public, on the bank's website, serving visitors who are not yet customers.
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CHANGING IT IN PLACE, THE CAPABILITY THAT DECIDED IT

The assistant running today is the one that launched, and it is not the same product

Its instructions have been rewritten a hundred and twenty-seven times. Two agentic actions were switched on four months into its life. Its corpus has been recrawled as the bank's site changed. Every one of those changes landed on the deployment already answering visitors, and none of them produced a second assistant, a migration or a day out of service. That is the difference between buying a finished thing and buying something you can keep deciding about, and it is the reason a bank of this size can start narrow without betting the deployment on getting it right the first time.

THE RECORD

The same assistant, before and after it was widened

MEASURE	FIRST FOUR MONTHS	SINCE THE ACTIONS WERE ENABLED
Agentic actions on each answer	None	Two
Questions asked, raw	807	1,433
Days carrying a question	31 of 114	243 of 259
Share of days with a question	27.2%	93.8%
The assistant itself	Unchanged	Unchanged

WHY CUSTOMGPT.AI CAME OUT ON TOP

The assistant could change under live traffic. Two capabilities were added mid-life, and the questions kept arriving through the week it happened.	The instructions stayed editable. A hundred and twenty-seven revisions, none of which required rebuilding the assistant or reloading its material.	The answer boundary never moved. Grounded in the bank's own published material from the first day to the most recent, through every other change.
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WHAT THIS MEANS FOR YOU

Ask what you are still allowed to change once it is live

Treat wording and capability as separate questions. Editing what an assistant says and changing what it can do are different jobs, and a platform worth buying lets you do both without a migration.	Do not judge it on the first quiet quarter. This deployment was asked something on one day in four to begin with. The part of the record worth reading starts after that.
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LOOKING AHEAD

The first-time buyer comparing notice periods at eleven at night gets the bank's own terms and can see which page they came from. The teller keeps the conversations that need a person and loses the ones that never did. The marketing manager who could always see where visitors gave up now has something on that page that answers them.

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.

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