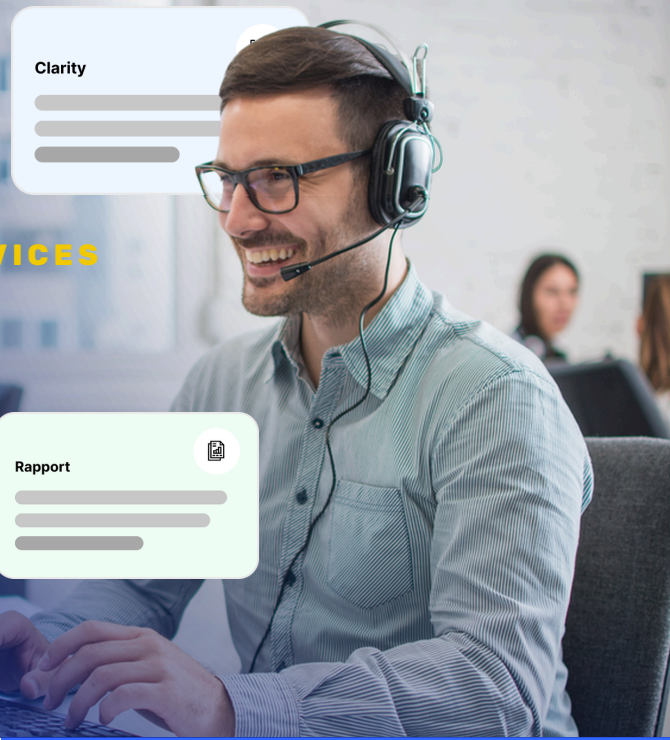




AI ROLEPLAY & COACHING | FINANCIAL SERVICES

Give your sales team the practice they need to earn trust



Important financial conversations leave no room for uncertainty

Financial products are complex, heavily regulated, and often overwhelming for customers. High turnover, shifting rates, and strict compliance rules make it hard for teams to stay sharp, and missed details can damage credibility. FunnelX uses AI roleplay to mirror the conversations sales reps and account managers face every day across lending, insurance, banking, and wealth management services. Reps can practice prospecting, inbound calls, cross-sells, and compliance-aligned messaging until their delivery becomes natural.

Why FunnelX

- 1 Practice revenue-driving conversations**
Train sales reps on lending, insurance, banking, and wealth scenarios to boost confidence.
- 2 Build trust from first contact**
AI roleplay helps reps sharpen prospecting, inbound calls, follow-ups, and cross-sell conversations.
- 3 Stay compliant and consistent**
Teams practice approved messaging and disclosures to communicate clearly without compliance risk.

HIGHLIGHTS



Live AI roleplay

Sales reps can practice walking customers through loans, credit cards, rates, and specific investment products without hesitation.



Live AI coaching

AI coaching highlights where sales reps drift from required terminology or disclosures so they adjust fast.



Sales analytics

Surface patterns in how sales reps explain rates, terms, coverage, and investment options across all practice sessions.



Faster onboarding

New reps and advisors immerse themselves in realistic financial scenarios from day one.

AI-powered training designed to build confidence and become trusted advisors

FunnelX delivers the core features that help your financial services sales teams practice the skills needed to earn customer trust and grow accounts.

Persona-based simulations

Practice everyday scenarios based on your customers and products to help reps learn how to communicate in real calls.

Instant feedback

Sales reps get instant guidance on clarity, tone, and messaging to refine explanations and build stronger habits.

On-demand AI coaching

Sales reps chat with an AI coach to break down conversations, understand mistakes, and get practical direction they can apply right away.

Leaderboards & reporting

Use friendly competition, personalized reports, certifications, and scheduled simulations to keep teams engaged, motivated, and constantly improving.

Recreate relevant scenarios

Import your call data, sales content, and playbooks so reps train on accurate messaging, disclosures, and product details.

Call reviews with clear scoring

Leaders and reps can review transcripts, history, and scores to see progress and focus coaching where it will make the biggest impact.



Ready to give your sales teams the experience they need to win every opportunity?

Your customers don't give second chances. FunnelX gives your sales reps the practice they need to build trust and confidence the first time.

Contact us at sales@funnelx.ai to book a demo

