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Practical AI fi customer relationship inna financial services

Harbour Think Tank, Caribbean AI Association, under the leadership of Adrian Dunkley | 2026-11-11

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Weh di test fi cover

Keep di client request, di firm promise an proof of completion apart. Start with internal logs an handovers. Check identity, permission, escalation an message approval before serving clients directly.

Ten use case fi test

01. Promise log. Keep original date, owner, passage an state. Compare wid hand-checked cases. Count missed promises an wrong entries separately. Staff alone update di live log.

02. Handover. Set out situation, background, assessment an next action. Receiving team accept or return it. Count returns an repeated questions.

03. Routine questions. Answer from di current approved library. After every change repeat di same tests, including a superseded document.

04. Requested follow-up. Draft only against an existing request. Di relationship manager check recipient, date, status an reply history before sending.

05. Contact choices. Match each field to its authoritative record. Data steward resolve conflict an test opt-out across every system.

06. Limited WhatsApp entry. Test handover, opt-out, unsupported question an requests for account details. Owner count privacy failures an verify secure handover.

07. Complaint packet. Rebuild chronology from original records an test closed cases. A second handler check deadline arithmetic by hand. Complaint owner decide.

08. Recurring friction. Two reviewers code cases independently. Check agreement wid kappa, rank common themes, then inspect serious exceptions separately.

09. Service status. Explain verified status without exposing internal detail. Ask di client to say what happen next an fix misunderstanding.

10. Manager change. List open requests an promises without expanding access. Incoming manager sign off an check access only to assigned clients.

Di 90-day test

Day 1–15: pick one task. Name di owner an who can stop di test. Write down di approved source, access, time an error inna di work now. Day 16–45: test hard case an record weh disagree. Check every output an keep di test separate from live work.

Day 46–75: compare like task wid like task. Count di time fi prepare, check an fix. Day 76–90: look pon di serious error dem an decide fi widen, change or stop. Di think tank propose di workflow an priority dem. Dem never measure result from a company rollout. Di full English paper give di process, duty table, checks an source notes.

Suos dem

[1] Caribbean AI Association. Think Tanks. Harbour programme remit: economy, work and enterprise. Accessed 26 October 2026.

[2] Financial Services Commission, Jamaica. Market Conduct Guidelines for Securities Dealers, SR-GUID-20/01-0026, 31 January 2020. Sections 5, 7 and 8.

[3] Bank for International Settlements. Annual Economic Report 2024, Chapter III: Artificial intelligence and the economy: implications for central banks.

[4] WhatsApp. Business Messaging Policy. Updated 23 September 2026; accessed 26 October 2026.

[5] Office of the Information Commissioner, Jamaica. Data Protection Standards. Accessed 26 October 2026.

[6] Agent Skills. Agent Skills Overview. Accessed 10 November 2026.

Dis short edishan go wid di full orijinal ina Inglish.

Inglish edishan (PDF)