



CUSTOMER SERVICE EXCELLENCE REQUEST HANDLING AND PROCESS

Digitally transforming a financial institution to harmonize data across numerous legacy systems to ensure data consistency and optimize customer experience by establishing a single point application to authenticate customers efficiently, gather queries, and address them satisfactorily within a minimal timeframe.

CLIENT BACKGROUND

Our client is a global finance and investment company serving over 5 million customers across large companies, non-profits, and institutions. Primary offerings of the client include integrated banking services with mobile and online banking with aspirations to be recognized for its customer-centric culture, continuous improvement mindset, and superior capabilities.

ENGAGEMENT STORY

The client's existing process was highly customer-centric. The rapid increase in the size of the customer base made the existing system difficult to use. However, a transition from the existing system could impact the service delivery and create a dent in the customer experience, compromising the values the organization was aspiring to deliver.

As a provider of banking, financial, and investment services, the client had to be on top of a diverse spectrum of end-customer needs with a minimal turnaround time. The primary challenge was handling varying service requests across the different touchpoints with minimal turnaround time.

The second challenge dealt with identifying a means to synchronize data across different sources for data consistency. For instance, a customer with a complaint regarding their bank account had the option to either reach out to the local branch or call a contact center agent. With different teams offering different services, inconsistency in data could result in serious ramifications. The changes had to sync up dynamically after successfully logging the records.

Primarily the client was aiming to resolve the key business challenges that were arising out of two major problems – TB Process and the Write Off Process

TB PROCESS

Turnaround time

With the plethora of services offered by the bank, there is always a hectic demand for quick responses to queries. The high turnaround time for customer queries has led to an increasing number of complaints about the services' timeliness.

Multiple-touch points

One of the biggest challenges with customer service was the unavailability of a centralized means to address every single type of query from the customer. The process was challenging to streamline given the multitude of channels used, such as social media, email, chatbots, phone calls, and in-person visits.

Reduced Efficacy

Each contact point of the client was designed to address a different banking service that a customer might require. However, the multiplicity and range of ineffective touchpoints for reaching customers severely affected operational efficacy.

Data Consistency

The lack of a high-quality system for synchronizing banking operations with the minimal effort led to a significant gap in the business process. The fallout of this forced the employee workforce to spend more time on these manual tasks that curtailed efficiency and productivity.

Write Off Process

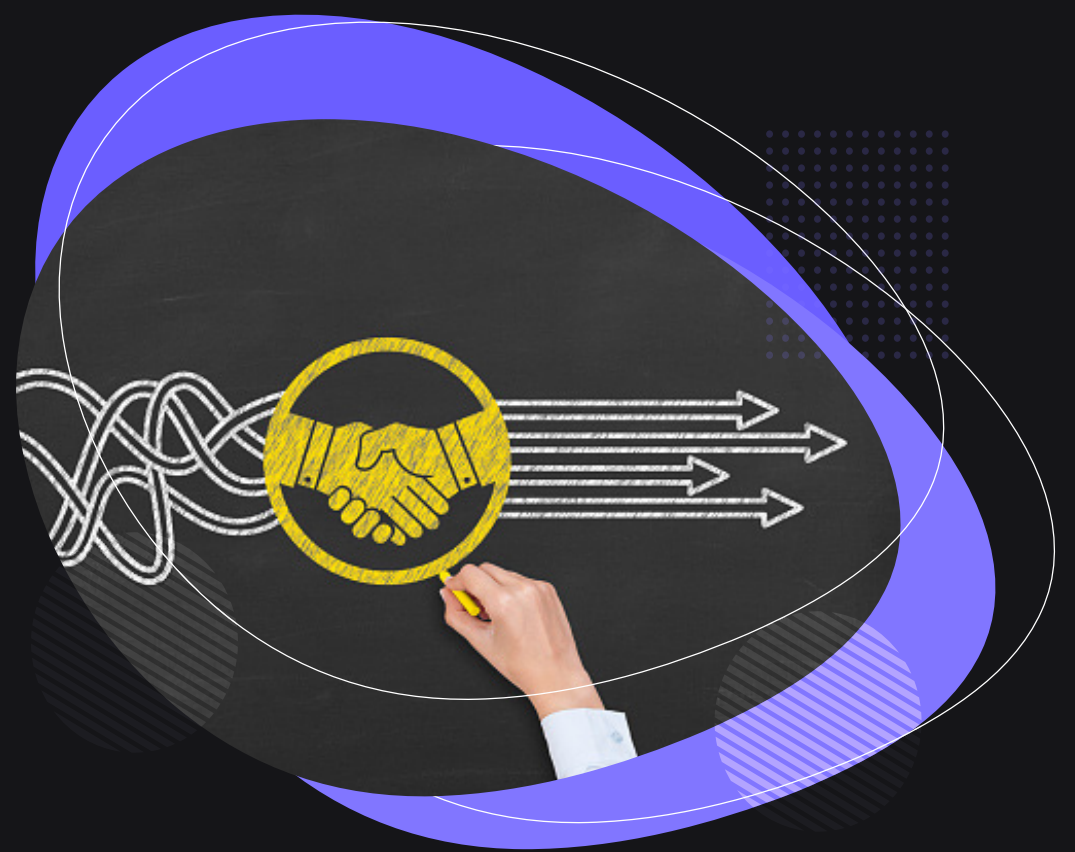
The legacy approach of performing a write-off process is quite tedious and having it as a part of the daily routine increases the workload on bank staff and also puts pressure on their availability. It also makes it difficult for banks to maintain their market competitiveness because this non-synchronous operation model is not in tune with modern-day requirements.

EVONSYS SOLUTION

EvonSys proposed a system to streamline operations through a single application equipped to handle customer requests with rapid authentication and minimal turnaround time by efficiently synchronizing all impacted legacy systems and communicating with them to ensure quick resolution. The application would also be equipped to handle multiple service queries at a single point in time with high efficiency.

Leveraging its expertise in Pega, EvonSys performed the following:

- Utilized the Pega Customer Service Framework to handle customer interaction through multiple channels. This framework is a robust set of tools that can work with customers across all channels, from social media and email to chatbots and web portals.
- Allowed classifying services provided to the customer by the bank into different intents in an interaction. This means that when a customer requests for the bank's service, the system can identify and categorize it into different intents like account balance inquiry, opening a saving account, or applying for a credit card.



- Leveraging the Pega CS framework capabilities like using different channels of interaction (Call, Inbound Correspondence, Research, etc.) with customers and creating Interaction cases and within the single interaction serving different customer service requests with Interaction and Intent concept.
- Propagating changes made due to service requests as a part of the interaction to other legacy systems like the mainframe systems with API calls and keeping all the systems in sync with ease. Evonsys partnered with Pega systems and provided support to the client by utilizing the Pega Customer Service framework.

Evonsys' highly qualified Pega team with excellent knowledge of the Customer Service framework drove the design and implementation of different project phases. Major implementations in successive versions include

- Innovis Authentication process,
- Embedding ODPreferences to ATMPINOrders,
- Suppressing Audit details,
- Product Simplification,
- CD Remediation,
- Fraud Notes Implementation,
- BizaggiToWRAAP changes,

TaxForm API upgradingThe team interacted with the client to understand the As-Is processes and underlying issues before designing a solution for enhancing process productivity.

BUSINESS VALUE

The new application and its accompanying solution fully accommodated all the client's key objectives. Some of the business values that the solution delivered are:

- Minimized resource cost/time
- Improved customer satisfaction through single interactions with multiple service requests.
- Eliminated unnecessary physical visits to the center.
- Increased efficacy in banking operations.
- Updated Banking records across different systems with a single application after offering the service.
- Reduced customer interaction time from hours to a few minutes per interaction, serving multiple customer requests in a single interaction.
- EvonSys completed the entire project in a short span of 12 months.

TESTIMONIAL



Team – during our meeting with our Innovis partners this morning they wanted me to extend their thanks and appreciation to everyone who supported the CSS integration. They were very impressed with the open communication and partnership of our team.

This effort took a lot of manpower and coordination and the payoff has been well worth the effort! The Contact Center colleagues are enjoying the their new Innovis experience and they love the added benefits of pre-populated info and the ease of updating the phone numbers when applicable

Denise R. Kelly
Business Support Manager, AVP





ASK US ABOUT THE EVOLVE WORK SHOP

CONTACT OUR TEAM.

We'd love to help you.

4550 New Linden Hill Road, Wilmington, DE-19808 +1 844 EVONSY

innovation@evonsys.com