

BANKING & FINANCIAL SERVICES FEATURES



Outreach & Dialer

Account Ownership

Assigns specific contacts to designated owners, ensuring only those owners access the records. This feature is ideal for sales teams or first-party debt collectors managing dedicated accounts for accountability and personalized interactions.

Agent & Group-based Voicemail

Enables routing of voicemails to specific agents or groups, ensuring efficient follow-up and personalized responses for improved customer support.

Automated Payment Reminders

Streamline billing by sending personalized, timely notifications via voice, SMS, or email. This feature reduces late payments, improves cash flow, and enhances customer satisfaction with proactive communication.

Consent Management

Tracks, stores, and manages customer permissions for communication. It ensures compliance with regulations, builds trust through transparency, and empowers customers to control their communication preferences across all interaction channels.

Appointment Scheduling

Allows agents to book, manage, and coordinate customer appointments seamlessly, improving efficiency, reducing missed opportunities, and enhancing customer experience through streamlined interactions.

Audio & Screen Recordings

Captures agent-customer interactions for quality assurance, training, and compliance. It provides actionable insights, ensures transparency, and helps optimize performance by analyzing communication and workflow effectiveness.

CTI Support

Connects telephony systems with desktop applications, enabling features like click-to-dial, screen pops, and call logging. This streamlines workflows, enhances agent efficiency, and improves the overall customer experience.

Dynamic Agent Scripting

Provides real-time, adaptive scripts tailored to customer interactions, ensuring consistent messaging, enhancing agent performance, and improving customer engagement and resolution outcomes.

Email/2-way SMS/Social Media

Ensures adherence to legal standards like GDPR, PCI DSS, and HIPAA. It incorporates features such as secure data handling, consent management, call recording controls, and audit trails. These safeguards minimize risks, maintain customer trust, and ensure ethical, lawful operations across communication channels, supporting businesses in meeting global compliance requirements.

Industry-leading Regulatory Compliance

Enables routing of voicemails to specific agents or groups, ensuring efficient follow-up and personalized responses for improved customer support.

LDAP, SSO/MFA Support

Ensure secure, centralized user authentication and access control. These features enhance security, simplify login processes, and support seamless integration with enterprise systems, improving compliance and operational efficiency.

Managerial Monitoring

Allows supervisors to oversee agent interactions in real time through live call monitoring, whisper coaching, and performance analytics. This ensures service quality, identifies training needs, and enhances team effectiveness.

Quality Assurance / Branching Scorecards

Evaluates agent performance using dynamic, scenario-based assessments. It ensures consistent service quality, identifies improvement areas, and tailors feedback, fostering agent development and enhancing customer satisfaction.

Reporting

Provides detailed insights into operational metrics like call volume, agent performance, and customer satisfaction. Customizable dashboards and scheduled reports enable data-driven decision-making, identify trends, and optimize workflows. This feature ensures transparency, improves efficiency, and supports strategic planning for better service delivery and overall contact center success.

Skip Tracing

Helps locate hard-to-reach customers by leveraging databases and public records. It streamlines data collection, improves contact rates, and supports compliance with privacy laws for effective customer outreach and recovery efforts.

Interactive Voice Response (IVR)

Automates call handling with customizable menus, enabling customers to self-serve or be routed efficiently to the right agent. It reduces wait times, boosts efficiency, and enhances the caller experience.

Interruptible Preview Dialing

Allows agents to review customer details before initiating a call, while supervisors can intervene or adjust dialing settings in real time. This ensures informed interactions, flexibility, and improved campaign management.

Multi-session Agents

Enable agents to handle multiple customer interactions simultaneously across channels. This boosts efficiency, reduces wait times, and optimizes resource utilization while maintaining personalized, high-quality service for each customer interaction.

Outbound Skills-based Routing

Assigns outbound calls to agents based on their expertise, customer needs, and campaign goals. This ensures personalized interactions, increases efficiency, and boosts customer engagement and conversion rates.

REST-based APIs

Enable seamless integration with external systems, allowing developers to customize workflows, access data, and extend functionality. They enhance flexibility, scalability, and interoperability, supporting tailored solutions for diverse business needs.

Secure Payment Data Collection

Ensures compliant, encrypted handling of payment information during transactions. It minimizes fraud risks, supports PCI DSS compliance, and builds customer trust by safeguarding sensitive financial data in a seamless, secure process.

24/7 Customer Support

Ensures uninterrupted assistance through live agents, chatbots, or self-service tools. It enhances customer satisfaction by providing timely solutions anytime, builds trust, and supports global operations by accommodating different time zones and urgent queries seamlessly.

Salesforce Integration

Interactions with Salesforce CRM, enabling real-time data sync, streamlined workflows, and personalized service. It enhances agent productivity, improves customer insights, and drives more effective sales and support strategies.

WebRTC phones

Enables browser-based voice and video communication without additional hardware. This simplifies setup, reduces costs, and enhances flexibility, allowing agents to deliver seamless, high-quality interactions from anywhere with an internet connection.

Real-Time List Management

Account Ownership

Assigns specific contacts to designated owners, ensuring only those owners access the records. This feature is ideal for sales teams or first-party debt collectors managing dedicated accounts for accountability and personalized interactions.

Advanced Automation

Streamlines processes using workflows for tasks like call routing, customer segmentation, and follow-ups. It boosts efficiency, reduces manual effort, and enhances customer experiences through faster, more accurate service delivery.

Convenient Contact Time Filtering

Schedules outreach based on customer availability and time zones. It enhances engagement rates, respects customer preferences, and ensures compliance with contact time regulations for more effective and customer-friendly communication.

Dynamic Lists

Automatically update contact lists based on real-time data and predefined criteria. They enhance targeting, improve efficiency, and ensure agents engage with relevant customers, optimizing outreach campaigns and customer interactions.

Attempt Tracking

Monitors and records outreach attempts across communication channels. It ensures compliance with contact policies, optimizes engagement strategies, and prevents over-contacting customers, improving efficiency and maintaining positive customer relationships.

Consent Management

Tracks, stores, and manages customer permissions for communication. It ensures compliance with regulations, builds trust through transparency, and empowers customers to control their communication preferences across all interaction channels.

Email/SMS Processing

Enables seamless, multi-channel communication. Agents can engage customers across platforms, manage conversations in one interface, and deliver consistent, personalized support to enhance customer satisfaction and streamline workflows.

Industry-leading Regulatory Compliance

Ensures adherence to legal standards like GDPR, PCI DSS, and HIPAA. It incorporates features such as secure data handling, consent management, call recording controls, and audit trails. These safeguards minimize risks, maintain customer trust, and ensure ethical, lawful operations across communication channels, supporting businesses in meeting global compliance requirements.

Message Tracking

Monitors the delivery and engagement of messages across channels like email, SMS, and social media. It provides real-time status updates, improves follow-up strategies, and ensures effective communication with customers.

Multi-tenant

Supports multiple clients or business units on a single platform with isolated data and configurations. It ensures scalability, cost efficiency, and secure customization while maintaining seamless operations for diverse user groups.

Number Portability Compliance

Ensures seamless handling of customer numbers across carriers, adhering to regulatory standards. It enhances customer retention, avoids service interruptions, and maintains compliance during number transfers, supporting smooth, uninterrupted communication.

REST-based APIs

Enable seamless integration with external systems, allowing developers to customize workflows, access data, and extend functionality. They enhance flexibility, scalability, and interoperability, supporting tailored solutions for diverse business needs.

24/7 Customer Support

Ensures uninterrupted assistance through live agents, chatbots, or self-service tools. It enhances customer satisfaction by providing timely solutions anytime, builds trust, and supports global operations by accommodating different time zones and urgent queries seamlessly.

Self Service

Context Continuity (inside of CXP as well as through APIs)

Ensures customer interactions seamlessly transfer between self-service and live agents, retaining all relevant data. This reduces repetition, enhances efficiency, and delivers a consistent, personalized customer experience across interaction channels.

NLU / Transcription / Voice Bot

Uses natural language understanding, real-time transcription, and voice bots to enable conversational interactions. This simplifies navigation, improves accuracy, and delivers seamless, human-like customer experiences for self-service workflows.

BUI

Offers a web-based platform for configuring IVR workflows. It enables easy access, real-time updates, and intuitive management, streamlining setup and enhancing flexibility for creating seamless, customer-friendly self-service experiences.

Open Architecture (bring your own MediaPlatform, Database, Operating System) / Driver Approach

Allows organizations to integrate their preferred media platforms, databases, and operating systems using a driver-based approach. This flexibility supports customized deployments, ensures compatibility with existing infrastructure, enhances scalability, and empowers businesses to create tailored, efficient, and future-ready IVR solutions aligned with their unique needs.

Backend Connectivity (REST, SOAP, Databases)

Enabling real-time data access and updates. This ensures seamless interaction with backend systems, enhancing functionality, personalization, and efficiency in customer self-service workflows.

Layer (Adapt-to-me, e.g. based on Personas, Language, Customer Profiles and Experience)

Personalizes interactions by tailoring menus and responses to customer personas, language preferences, profiles, and past experiences. This enhances usability, fosters engagement, and delivers a more intuitive and satisfying self-service experience.

Dynamic Call Flow (e.g. multi level event handling, dynamic filtering of menu options, bargein, global commands)

Adapts menus and responses based on real-time customer inputs, preferences, or context. It ensures flexible, efficient interactions, streamlining navigation and improving the overall customer experience.

Reporting (Dialog Stats, Business Tasks, Call Volumes, Dominant Path)

Delivers actionable insights into system performance, user interactions, and call patterns. It helps identify trends, optimize workflows, and enhance customer experiences while aligning IVR operations with business goals for improved efficiency.

Disposable Apps (e.g. for payments or surveys)

Enable quick deployment of temporary applications, such as for payments or surveys. These apps streamline specific tasks, are easily configurable, and can be decommissioned after use, ensuring flexibility and operational efficiency.

Notifications (e.g. to send payment confirmations or access codes)

Automates sending updates like payment confirmations or access codes via voice, SMS, or email. This enhances communication, ensures timely delivery of critical information, and improves customer satisfaction with proactive, efficient service.

IVR Front End

Provides the interface customers interact with, including menus and prompts. It ensures intuitive navigation, quick access to services, and seamless integration with backend systems for efficient, user-friendly self-service experiences.

Chat

Integrates text-based communication channels, enabling customers to interact via live chat or chatbots. It provides quick, convenient support, enhances accessibility, and complements voice-based IVR systems for a seamless omnichannel experience.

SMS

Enables automated text-based interactions, such as notifications, confirmations, or two-way communication. It enhances accessibility, provides quick resolutions, and complements voice and chat channels for a seamless, multichannel customer service experience.

Third Party Integrations Google Dialog Flow ES and CX

Enable advanced conversational interfaces. These integrations enhance natural language understanding, streamline complex workflows, and deliver personalized, intuitive customer interactions for superior self-service experiences.

SSO

Ensure secure, centralized user authentication and access control. These features enhance security, simplify login processes, and support seamless integration with enterprise systems, improving compliance and operational efficiency.

LDAP

Ensure secure, centralized user authentication and access control. These features enhance security, simplify login processes, and support seamless integration with enterprise systems, improving compliance and operational efficiency.