

# Multinational Financial Services Company

## Customer Success Story



### Region

Global



### Solutions

Verint®  
Workforce Management™\*

Verint Automated  
Quality Management™

Verint Application Triggers™

Verint Application Visualizer™

Verint Speech Analytics™

Verint Text Analytics™

Verint Digital Feedback™

Verint Voice Survey™

Verint Engagement  
Orchestration™

Verint Knowledge  
Management™

Verint Chat and Email™

Verint Community™



### Industry

Financial Services

### Results

- Increased quality scores by nearly 10% and reduced AHT by more than 60%.
- Improved customer satisfaction by 10 points.
- Cut agent training time by upwards of 85%.
- Streamlined digital transactions to be 76% faster via improved self-service.

### Opportunity

One of the most renowned names in the financial services industry, this company provides financial innovations and solutions to help individuals, governments, and businesses realize their greatest potential. To support this purpose, the company aspired to empower its global contact center operation, with 10,000+ agents and supporting 67 languages, to respond to any customer interaction, regarding any case, through any channel, and in any call center, whether it be Manila or Mexico City, depending on the agent available and the skill set required.

Key to this transformation was a clear vision and its partnership with Verint®, which offered the depth and breadth of customer engagement solutions to support its global contact center requirements.

### Solution

The financial services leader began its transformation working from the inside out, initially deploying Verint Engagement Orchestration™, Verint Knowledge Management™, Verint Chat and Email™, and Verint Workforce Management™ to form a solid customer engagement framework and empower its workforce to be more efficient and effective. These solutions also supported another critical goal of driving digital-first engagement via self-service processes and continuous improvement.

Overall, a key objective was to hide the complexity of the myriad of underlying systems, channels, rules, and processes agents were using worldwide. Today, everything the company's agents need is brought together elegantly and simply on one screen. Using Verint Engagement Orchestration, the company captures and presents voice, chat, email, knowledge articles, case notes, and even customer satisfaction surveys in a universal agent environment.

With Verint Workforce Management, the company captures workforce activity and performance data to support capacity planning and scheduling on a global scale. As a result, it ensures the right resources are in place to support call volumes and help meet its 20-second average speed to answer and under two percent abandon rate commitments.

With a core contact center foundation firmly in place, the company expanded its Verint footprint to include Verint Application Triggers™, Verint Application Visualizer™, Verint Automated Quality Management™, Verint Speech Analytics™, Verint Text Analytics™, Verint Digital Feedback™, and Verint Voice Survey™.

# VERINT®

# Use of Verint solutions enabled the financial services leader to deploy a purposeful, evolving technology stack to ensure best-in-class responsiveness, operational efficiency, and optimal performance.



Verint Application Visualizer was deployed to help the organization pinpoint agent struggles and to better understand and model the actions of top performers. From this, it can ensure the best path for optimal agent productivity and elevated customer satisfaction.

Verint Automated Quality Management was added to enable automatic evaluation of 100 percent of calls. Removing the onus and limitations of manual scoring, the solution also provides contact center leadership with greater depth and breadth of call quality data.

Finally, Verint Speech Analytics, Verint Text Analytics, Verint Digital Feedback, and Verint Voice Survey support the company's continuous improvement objective. With these solutions, it can more effectively uncover, understand, and act on customer needs, issues, call drivers, and more to elevate customer experience.

## Benefits

Use of Verint enabled the financial services leader to deploy a purposeful, evolving technology stack to ensure best-in-class responsiveness, operational efficiency, and optimal performance. Today, the company is achieving exceptional results, including improvements in average handle time (AHT) from 1,200 to 450 seconds and quality scores from 80.1 to 90 percent. In addition, it has seen a 10-point uplift in customer satisfaction.

During the height of the COVID-19 pandemic, when facing contact center shutdowns with only a 12-hour notice, Verint Engagement Orchestration and Verint Workforce Management were critical in enabling the company to quickly transition its agents to work-from-home environments where they could promptly resume servicing customers.

Verint Engagement Orchestration, in concert with Verint Knowledge Management, also helped the company reduce agent training time by making it easier for agents to find the right answers to simple to complex customer inquiries. Given the intricacies of the financial services sector, and the fact that the company's agents had to navigate a broad portfolio of 55 different products, this proved to be a godsend. Whereas previously it took six weeks to train an agent, new agents can now take calls with minimal supervision in about four to five days, with AHT metrics on par with seasoned agents.

The company's universal agent environment, where Verint Engagement Orchestration forms the backbone and Verint Knowledge Management the brains, also helps it more effectively comply with data security and privacy requirements worldwide. The system surfaces only the information needed to assist customers, without the need for agents to access any transaction-based systems. On top of this, knowledge-infused processes prompt agents as to the next-best action.

Further supporting its goal of driving digital-first engagement, the company's Verint technology stack enables customers to conveniently self-serve, performing transactions and accessing information anytime. This has had a measurable impact on contact center cost and process efficiencies, as well as customer satisfaction. In fact, based on the results achieved to date, the company is doubling down on its digital-first engagement efforts with the addition of Verint Community™.



Learn more at  
[www.verint.com](http://www.verint.com)

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