Capgemini

DEVELOPING A ONE UNIFIED DESKTOP CONTACT CENTER FOR A LEADING INTERNATIONAL FINANCIAL INSTITUTION

Capgemini collaborated with the company to design and develop a lean contact center that revolves around a One Unified Desktop model, which streamlines the experience for both agents and customers

A leading firm with a lagging contact center

A well-established international bank and financial institution had recently acquired a large American bank with an out-of-date contact center. Aging technology and limited personnel capacity were impeding the institution's ability to provide the desired level of customer care. When lockdowns hit in 2020 these issues became even more critical, as agents had no ability to work from home.

The firm faced a number of challenges from identifying pain points and opportunities, to researching vendors and developing an agent training program. But the priority in 2020 was enabling call center staff to work off-site. The financial institution worked with Capgemini to migrate its basic CX platform to Amazon Connect, an omnichannel contact center service, and in ten weeks, the firm's 1000+ agents were up and running from home, maintaining business continuity for the firm's tens of millions of customers.

In addition, it was clear to the company that the acquired bank's contact center was wholly unequal to the firm's standards and would need to be replaced. During phase two of the project, the financial institution and Capgemini began the transformation process by identifying typical customer journeys and migrating them one by one to Amazon Connect, thus ensuring business continuity at all times.

Finally, the partners began the process of moving the firm's business verticals to the One Unified Desktop model, which enhances agents in multiple ways by connecting:

- every interaction in a customer's history, providing agents a 360° view of customers and their needs
- each of the firm's services and products, enabling one trained agent to handle a wide range of queries without time-consuming transfers
- multiple business verticals, enabling agents to cross-sell services to customers who fit the right profile.

Client: Global Investment management and financial services company

Region: US

Industry: Banking & Commercial Markets

Client Challenge:

A leading international financial services company had more customers than their outdated contact center could handle. To grow, and to affirm their customer-first reputation, they needed an entirely new strategy.

Solution:

With Capgemini's help, the company designed and built a new agile contact center based around the One Unified Desktop model – simplifying agent and customer journeys, enhancing upselling and cross-selling opportunities, and laying the groundwork for outstanding customer support.

Benefits:

- Improvements on all key contact center metrics, including shorter average wait times, shorter average call handling times, and increased first-time resolutions
- Increased capacity – tens of millions of customers can now resolve their issues faster than ever
- Reduced cost of operations
- Greater flexibility by enabling agents to work from home during the Covid pandemic
- Improved customer and user experience

The company and Capgemini also launched a program to cross-train agents. Because bank customers rate wait times and multiple transfers as among the most common causes of frustrating experiences, the project team helped prepare agents to handle an increasingly wide range of issues. In doing so, the partners helped save customers' time, improved the image of the bank as a capable, knowledgeable institution, and enhanced the experience of agents, whose jobs became more varied, and who now feel confident to assist with a range of subjects.

Agents also gained access to the firm's customer relationship management (CRM) system, creating new opportunities for growth. Through this project, the financial company and Capgemini turned a contact center from a last resort for frustrated customers into a modern, multi-purpose information hub.

Turning a contact center into an engine for growth

The firm is now thriving with a new contact center based on agile technology, centered around the One Unified Desktop model, and defined by a seamless customer experience. To give a sense of the opportunities this makes possible, imagine a typical call – a customer wants to understand the fees on her credit card.

Previously, her experience would have consisted of a lengthy battle with the interactive voice response (IVR), followed by one or two transfers to different agents – each of which would involve wait time – and the best possible resolution would have been a clear answer to her question.

Today, that same customer is efficiently routed to a well-informed agent, who looks beyond the question of fees and sees the bigger picture: this customer is dissatisfied because her finances are complex and her needs are not being met. The agent answers the question, then goes on to suggest a new suite of services that better match the caller's needs. The customer leaves satisfied, and the bank has turned a complaint into an upsell.

The transformation has been a success by every metric – shorter average wait times, shorter average call handling times, and increased first-time resolutions. Agents and customers are more satisfied, there are greater opportunities for upselling and cross-selling, and the financial services company is thriving in the American market, in part due to a simple, unified contact center.

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 360,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2022 global revenues of €22 billion.

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