



REBOOTING ENGAGEMENT WITH AI

How Infosys optimised customer services for a leading US bank

Abstract

When Sasha Miller, the Chief Information Officer at a leading US-based bank, wanted to improve its customer service operations, she partnered with Infosys. Together, they automated and streamlined the bank's processes with a robust and secure Genesys Agent Copilot implementation that improved customer satisfaction, reduced 5822+ manual hours and delivered significant cost savings.



Slowed down by outdated processes

Sasha Miller is the Chief Information Officer at a leading bank that operates nearly 200 retail branches across the U.S. A major player in the industry for over a century, the bank prides itself on having built strong relationships within the community. For Sasha, upholding this legacy was integral to all she did. However, she remained realistic about the changes that technology had brought to the banking industry, recognising that it came with both challenges and opportunities.

As she looked for avenues for improvement, she closely evaluated

their customer service operations, which played a pivotal role in customer retention. However, as she examined the processes and the team's ability to handle complex queries, a few sobering truths emerged. While some processes showed potential for improvement, some were long overdue for restructuring. The inefficiencies in the extant process had slowed down productivity, and at the same time, increased the cost of operations. Although this required urgent attention, the bank lacked the expertise and technical capacity to restructure and optimise operations on

such a large scale.

After consultations with her broader team, Sasha initiated conversations with various vendors to find a suitable solution, and one vendor stood out – Infosys. As she evaluated the proposal and the capabilities that Infosys possessed, she was certain that she had found the right partner. Once the partnership formalities were complete, a team of experts from Infosys led by Riley Marsh, an experienced transformation specialist, stepped in.

Modernising processes with AI

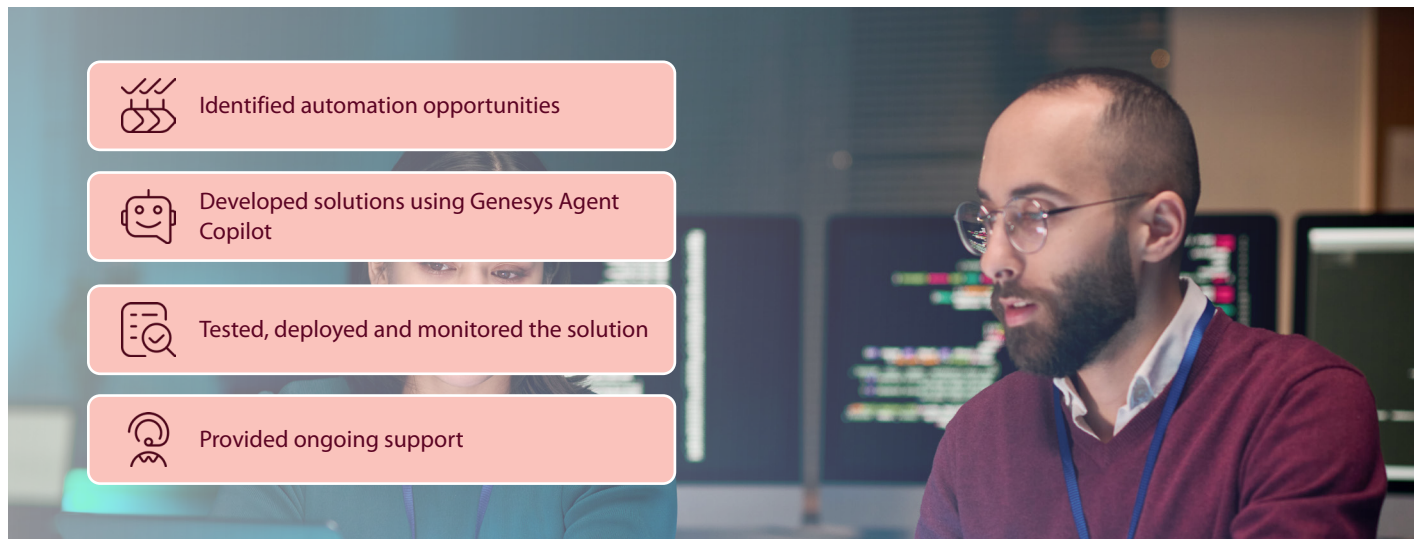
During briefing sessions with Riley, Sasha stressed the need to enhance operations so that service agents could handle customer inquiries promptly and cost-effectively. After the briefings, Riley and his team started by working with the customer service team to understand the

existing processes and then identify areas for improvement.

It soon became clear that the bank could gain a competitive edge and solve its efficiency and operational cost issues with the help of automation. Riley presented

his findings to Sasha and recommended the adoption of Genesys Agent Copilot, an artificial intelligence (AI) based solution designed to empower service agents to deliver superior customer experiences.

Approach summary



Sasha acknowledged the opportunities that automation presented but expressed concern about the security risks involved in allowing it access to sensitive data and systems. However, her doubts dissipated once the Infosys team demonstrated how their adherence to internationally accepted quality assurance standards helped minimise security incidents.

With Sasha green signalling the automation, Riley and his team developed solutions for three critical areas with Genesys Agent Copilot: routing strategy, post-call summary, and knowledge base.

The team enhanced the existing call routing strategy with AI which bypassed traditional methods to match customers with agents best suited to resolve a query. This predictive routing system not only reduced queue times but also improved customer satisfaction. Secondly, to ease the manual effort needed to create post-call summaries, the team automated the creation of summaries, thereby increasing accuracy. Finally, by linking the knowledge base with Genesys Agent Copilot, service agents could now quickly find relevant information during live chats with less effort.

Riley's team rigorously tested every aspect of the solution and regularly met with Sasha and the customer service team to refine the automation process. After deployment, Riley continued to monitor the performance of the solutions without disrupting ongoing operations. His team also promptly addressed issues and made necessary adjustments for greater efficiency. With their structured approach to implementation, the team fostered a spirit of partnership and trust while streamlining the customer service operations.

Even better relationships with smarter service

Sasha had already begun to observe a transformation in processes when she sat down with Riley to review the results of the engagement. The various process improvements and automation

implemented by the Infosys team helped save more than 5822 hours' worth of manual effort. As a consequence, customer satisfaction increased and costs reduced, an outcome that delighted Sasha.

Moreover, the ease of doing business improved as order processing and request handling got streamlined.

Though the initial brief was limited to improving operations, the expertise demonstrated by Riley and his team gave

Sasha the confidence that they could handle even more. So, she later expanded the partnership to include over a hundred

full-time equivalents (FTEs) from Infosys , deployed globally. The team now handles a staggering 499,000 calls annually.

Key benefits



After embracing AI and automation, Sasha is confident that the customer service team has all it needs to deliver better

customer experiences. With Infosys on her side, she continues to look ahead to the future and the possibilities that

technology can create for the bank as it serves the community.

**Names have been altered to preserve the identities of the people involved.*

For more information, contact infosysbpm@infosys.com

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