# PICKING THE RIGHT TOOLS FOR CUSTOMER DELIGHT

Abstract

Financial companies most often have to deal with large numbers of customer queries, issues, and requests. An American financial firm partnered with Infosys BPM to streamline the responses to customer requests across its IT landscape, to focus on customers' unique needs and priorities. Infosys BPM developed a solution that not only helped in scaling the existing operations in an efficient manner, but also helped enhance the customer satisfaction.

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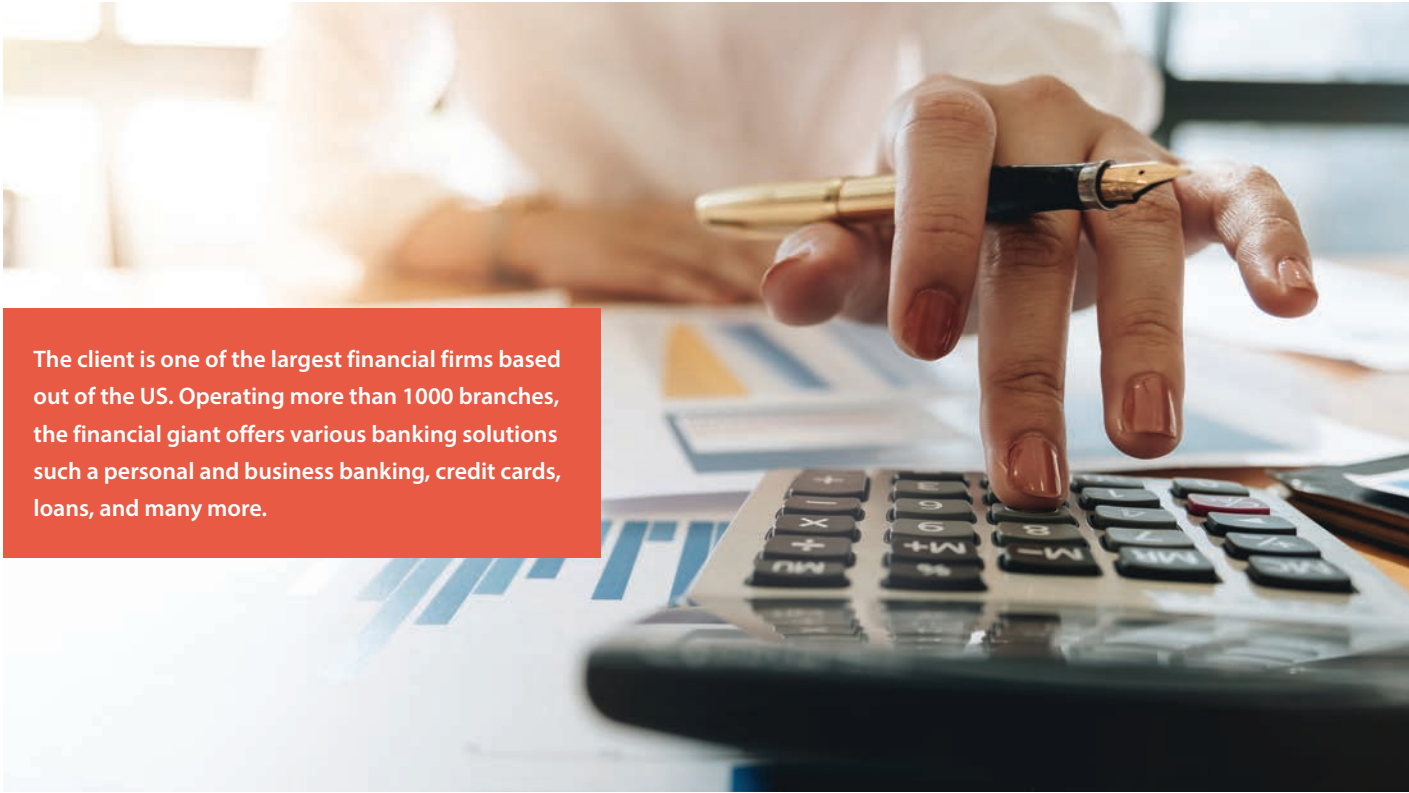
The client is one of the largest financial firms based out of the US. Operating more than 1000 branches, the financial giant offers various banking solutions such a personal and business banking, credit cards, loans, and many more.

Broken tools

The client was facing challenges in handling the volumes of Incidents raised by customers, as the incumbent ticketing system was not capable of handling large volumes.

The customer satisfaction survey response was very low, with less than 3% response rate. As a result, the client was unable to get proper feedback on ServiceNow. The client also conducted an anonymous survey, but did not receive feedback on the intended services, and rather got generic, negative feedback.

The client needed help in identifying additional and appropriate tools to suit their needs and satisfy customer requirements. To align with the future expanded use and possible increased growth in the number of service requests, sustained scalable growth was, indeed, the need of the hour.

Gearing up for scale

It's imperative for financial institutions to not just meet customer expectations but also exceed them to build robust customer loyalty. Also, an enhanced customer experience can lead to an increase in revenue for the institution.
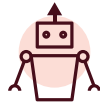
The client partnered with Infosys BPM to overcome the challenges. The Infosys BPM team worked closely with the client to identify tools that could be used to provide seamless support to the users raising tickets. The innovation and automation were driven:

Self-service tools	Self-healing tools	Robotics process automation (RPA)	Real-time analyst and IM bots	QA monitoring and chatbots

The service desk was a vital element in the customer experience journey. It needed to be the single point of contact for all users to raise any issues/requests. The first step involved the creation of an Information Technology Infrastructure Library (ITIL) compliant service desk with a focus on quality improvement, with the aim of providing a superior and enhanced end user experience while also being equipped to scale up the operations. This technology service desk needed to have a global outlook as well as a regional focus, and also needed to provide a hybrid remote and desktop operating model. Hence,

mainframe systems with Office 365 and Windows 10 were used to make the service desk a one-stop shop.

The next step involved utilizing all the powerful features of ServiceNow. This started with the enablement of the feedback management module of ServiceNow for complaints and commendation on services provided. ServiceNow-automated workflows were created for tickets to be easily routed to the right resolver group. Not only that, the ServiceNow knowledge base was used as a central repository for creation, updates, and retirement of knowledge articles.

Another step taken was the setting up of self-help tools for the users. These tools helped in reducing password-reset and account unlock calls.

The icing on the proverbial cake was the priority support provided to VIP users. This was done by the direct routing of their calls to the L1.5 team for immediate remote support.

The team also scaled up the Service Desk L2 internally, where advanced troubleshooting steps would be performed by the experts to resolve those issues which L1 was unable to resolve.

Scaled up, up and away

The various steps taken as part of the solution provided to the client, helped achieve enhanced operational efficiency while enabling to scale up the operations.

Responses to incidents and service requests showed a significant improvement with 100% responses for all the priority 1 to priority 4 tickets that were raised, without a single miss in the last 6 months. The client saw a substantial improvement in the call abandonment rate as well, bringing it down to less than 2%. In addition, the CSAT SLA continued to show an upward trajectory and closed at 97 percent in the month of March 2022.

The solution also helped the L2 support team in shifting some of its activities to the L1 team, thereby enhancing the first call resolution (FCR) percentage.

Seamless customer experiences are the only way to create customers for life. The Infosys BPM team embodied this philosophy as they boldly embraced the challenges faced by the client and drove IT transformation to build a modern bank thriving on innovation.

For more information, contact infosysbpm@infosys.com

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