

## TRANSFORMING CX OF A FINANCIAL SERVICES COMPANY WITH AI CONTACT CENTER AI AGENT

### Processes Automated:

- EMAIL, VOICE & CHAT AUTOMATION
- TICKETING SYSTEM
- PAYMENT PROCESSING

**85%**

Interactions handled by AI Agent

**70%**

Reduction in Total Cost of Ownership

**100%**

Accuracy & zero data entry errors

**85%**

Coverage of supplier invoices

## ABOUT

The company is a leading player in the asset and wealth management business and caters to HNI and UHNI markets globally.

In its three-decade journey, the company has spread its presence to 24 offices and branches across the globe.

# CHALLENGE

The company was facing issues of ever-increasing inbound calls per month. Their main concern was to deliver better customer experience and improve the quality of interactions. The teams/human agents were working on peak capacity and struggling to keep up with the surge in calls. On an average, the contact center was receiving 30,000 inbound calls in a month.

The productivity was severely affected as the average handling time (AHT) stood at 30 minutes while the average turnaround time (ATT) took 24 hours. With a below average customer experience, the Net Promoter Score (NPS) was recorded at 6/10. This meant most of the customers were not particularly thrilled by the services, possibly resulting in high customer attrition.

*It assists customers with queries around portfolio, transaction statements, summary, charges, and trades. It enables account management activities like updating contact details, nominees, transaction limits, etc.*

# SOLUTION

The company was looking for options that could help improve CX and eventually the overall NPS for their contact center. They had heard about AI based contact center and wanted to explore its implementation in their processes. With automation, the team could focus more on issues requiring extra attention while the AI Agent could manage routine queries expertly across voice, chat, and email. This allowed the human agents to build a healthy communication with customers improving the quality of live interaction. The company engaged with Supervity to implement its AI agent contact center to address customer issues in real time providing best resolutions with an option for live agent transfer if needed.

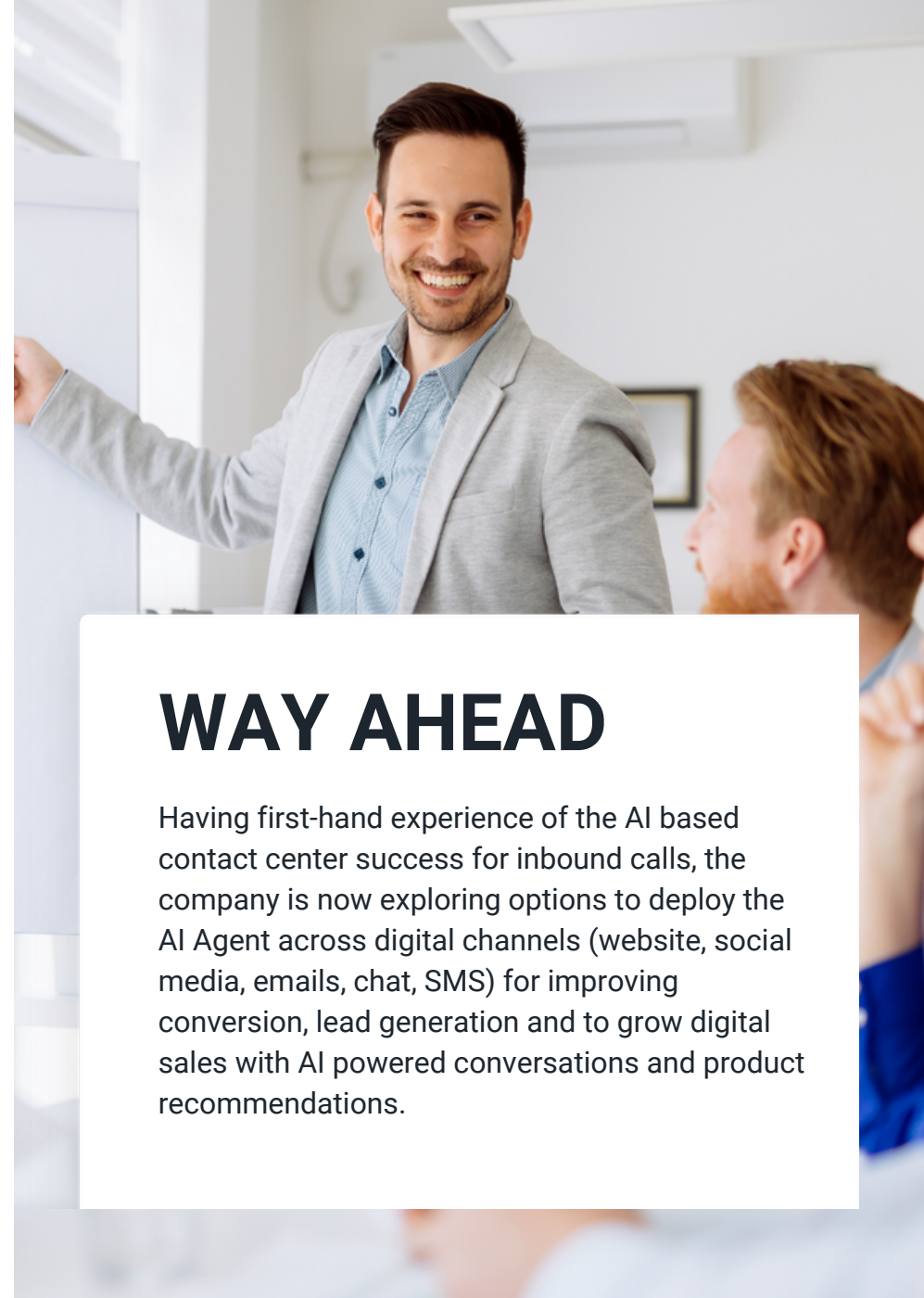


# JOURNEY

After going live with the Contact Center AI Agent, the company witnessed continuous improvement in AHT and ATT. In just one month, the company's contact center witnessed significant improvement with the AHT reduced to 2 minutes, ATT to 4 minutes and above all the NPS rose to 8.5/10.

Backed by Vision, RPA, conversational AI and NLP, the AI Agent initiates conversations across voice, chat and email; understands user query and intent through NLP; Creates a ticket under relevant category and assigns to self; Helps customers with common business queries and option complex queries to a human agent.

Due to this ability, 85% interactions are now being handled by the AI eworker and the company has witnessed 70% reduction in Total Cost of Ownership (TCO).



## WAY AHEAD

Having first-hand experience of the AI based contact center success for inbound calls, the company is now exploring options to deploy the AI Agent across digital channels (website, social media, emails, chat, SMS) for improving conversion, lead generation and to grow digital sales with AI powered conversations and product recommendations.



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WE CAN DO IT FOR YOU**

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