

From Call Chaos to Structured Support: Improving Customer Experience in Banking



Without Centralized Tracking, Banking Teams Struggled to Measure Call Performance

CSI has a long-standing reputation for providing financial institutions with secure and efficient technology solutions. When Community First Bank of Indiana (CFB Indiana) faced growing challenges in managing customer inquiries, CSI identified an opportunity to streamline operations and improve service quality.

The Challenges

Previously, customer calls were routed to individual branches and the Operations Department, leading to inconsistencies in response times and service quality. Without proper tracking tools, the bank had no way to measure call volume or response times. Employees were also stretched thin, balancing incoming calls with in-branch customer interactions and daily operational work.

We had no way to track call volume before. Without visibility, it was impossible to know where we needed to improve or how many resources were needed,

- Bea Wiles, SVP and COO at Community First Bank of Indiana.

LinkLive Resolution

To solve these challenges, CSI recommended LinkLive - an AI-enabled contact center platform - for CFB Indiana to implement into its banking technology suite. With LinkLive providing the support to centralize customer inquiries and introducing real-time reporting, CFB Indiana improved efficiency while maintaining the personalized service their community bank customers expect.

Real-Time Monitoring, Call Categorization, & Smarter Transfers for Better Banking Support

CFB Indiana adopted LinkLive's advanced communication tools, creating a centralized contact center that streamlined customer interactions. This transition introduced several key features that improved efficiency and service quality:

THE LINKLIVE FEATURES THAT MAKE A DIFFERENCE:

- **Intelligent Call Routing:** Calls were no longer directed to individual branches but instead routed to trained contact center agents, ensuring a consistent customer experience.
- **Live Call Monitoring & Analytics:** Supervisors gained real-time insight into call volume, wait times, and service trends, helping them optimize staffing and response strategies.
- **Disposition Codes:** Each call was categorized based on its purpose (e.g., balance inquiries, loan questions), allowing the bank to track trends and refine customer service strategies.
- **Warm Transfers:** Instead of cold handoffs, agents introduced customers and provided context before transferring calls, ensuring smoother, more efficient resolutions.
- **Secure, Multi-Channel Capabilities:** While the initial rollout focused on voice communications, CFB Indiana began testing chat integration on the bank's website and online banking platform to offer customers convenient digital support options.

Stronger Data Visibility and Smarter Workflows Helped Optimize Banking Support Operations

With LinkLive fully implemented, CFB Indiana saw immediate improvements in its customer service operations. The transition to a centralized contact center provided greater efficiency, clearer insights, and a better experience for both employees and customers.

By shifting away from a branch-based call model, the bank was able to resolve key challenges and unlock new opportunities for improvement, including:



Improved Efficiency

Contact center agents handled 200–270 calls per day, allowing branch employees to focus entirely on in-person service.



Better Data & Visibility

Supervisors could now track call volume, abandonment rates, and repeat callers, enabling data-driven decision-making.



Consistent Customer Interactions

Standardized responses ensured customers received accurate, professional support no matter which agent they spoke to.



Reduced Customer Frustration

The introduction of warm transfers meant customers no longer had to repeat their issue multiple times, improving satisfaction.



Opportunities for Automation

With new data insights, the bank identified that a large portion of calls were basic balance inquiries, prompting consideration of self-service banking options to reduce call volume.

Additionally, employees across the organization expressed higher job satisfaction, as branch staff were able to dedicate more time to in-person customer relationships, while contact center agents worked in a structured, well-supported environment.

Building a Future-Ready Customer Experience with Online Chat and Self-Service Banking Options

With its contact center fully operational, CFB Indiana is looking to build on its success. To keep up with growing call volume, the bank plans to add another agent, ensuring continued efficiency while maintaining high service standards. At the same time, it is refining workflows to further streamline customer interactions.

The bank is also preparing to introduce online chat as an additional support channel. Currently in testing, this feature will allow customers to connect through the bank's website and online banking platform, offering a more flexible alternative to phone calls.

By expanding digital engagement, CFB Indiana aims to create a seamless experience while reducing strain on contact center agents. **"Customers used to get bounced around between branches, but now they reach the right person faster, and the bank is excited to expand even further with online chat and self-service options,"** said Bea Wiles.

Additionally, data from LinkLive has revealed opportunities for automation. Since a significant portion of calls are simple balance inquiries, the bank is exploring self-service solutions, such as an automated telephone banking system. CFB Indiana is well-positioned to evolve its customer engagement strategy and stay ahead of shifting digital expectations.



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