



How CSI Elevated Banking Voice Support and Efficiency with LinkLive

Moving Voice, Chat, and Digital Under One Roof Elevates Financial Call Center Support

As a trusted provider of outsourced call center services, CSI supports hundreds of banks with reliable and efficient voice and chat support—ensuring every customer interaction meets the highest standards of service and security.

With high call volumes and diverse banking inquiries, CSI consistently delivered exceptional service, but saw an opportunity to enhance efficiency and improve performance tracking through a more unified communication platform.

“Our previous provider only allowed us to see basic KPIs, and we couldn’t easily adjust settings or manage different programs. Without real insights and control, maintaining service excellence was a challenge. We needed a solution that put us in charge.”

– Kimmee Garcia, Digital Customer Support Manager at CSI

Before Adopting LinkLive

CSI struggled with an incumbent provider that limited administrative control, restricted access to in-depth performance metrics, and made it difficult to manage multiple programs effectively.

By Switching to LinkLive

CSI seamlessly integrated voice, chat, and digital support into a single, all-in-one system, allowing them to take their call center operations to the next level and deliver even higher standards of customer service.

Centralized Call Handling, Dashboard Insights, and Smart Shortcuts for Better Service

In just a few months, LinkLive has helped CSI transform their operations, providing valuable tools and features that improve call handling, agent accountability, and customer satisfaction.

“LinkLive gives us full control over the admin side, which makes a huge difference. We can customize settings and workflows exactly how we need them—even down to the hold music.”

– Kimmee Garcia, Digital Customer Support Manager at CSI

THE LINKLIVE FEATURES THAT MAKE A DIFFERENCE:

- **Centralized Call Management:** The super user feature allows agents to manage all calls within a single platform, reducing delays from platform-switching and enhancing service consistency.
- **Managing Missed Calls:** Call management tools provide visibility into missed and exited calls, helping supervisors address performance issues and maintain high service standards.
- **Canned Responses and Shortcuts:** Pre-built responses and quick-reply tools help agents efficiently manage common banking and bill pay inquiries, reducing call times and enhancing customer experiences.
- **Streamline Quality Assurance:** The call recording and QA forms simplify agent evaluations, enabling supervisors to deliver targeted coaching and ensure service quality.
- **Faster CRM Updates:** Conversational summaries allow agents to reduce wrap-up times, improving the speed and accuracy of CRM documentation.
- **Real-Time Dashboard Insights:** The dashboard provides detailed visibility into call volumes, agent availability, and service performance, supporting smarter staffing and operational decisions.

Faster Calls, Lower Costs, and Improved Workflows for Better Banking Support

Implementing LinkLive delivered measurable results for CSI, amplifying their strengths and unlocking significant business benefits—from faster call handling to substantial cost savings.



Call Handling Efficiency

The centralized platform helps agents reduce call times, leading to faster resolutions and shorter customer wait times.



Smarter Staffing Strategies

The real-time dashboard allows CSI to shift from full-time to part-time staffing, particularly on weekends, resulting in significant cost savings while maintaining consistent service coverage.



Enhanced Accountability

Managers can monitor missed and exited calls, helping improve agent performance and maintain service excellence.



Operational Cost Reduction

By hiring part-time staff and aligning staffing with call volumes, CSI reduced costs by 50-70% during light call volume periods, improving operational efficiency.



High-Quality Customer Support

The streamlined quality assurance process ensures agents receive targeted coaching, contributing to better service experiences for banking customers.

These improvements have enabled CSI to provide more consistent voice support, boost customer satisfaction, and enhance operational efficiency, solidifying their position as a leader in banking customer service.

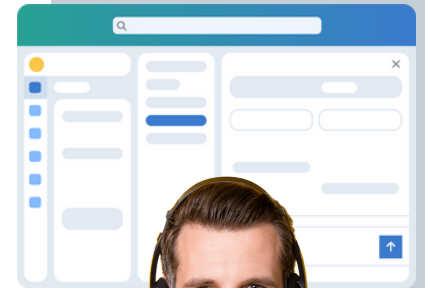
Preparing for Future Growth in Banking with Innovative Tools and Advanced Technology

CSI is expanding their services to provide more than just bill pay support, helping banks manage after-hours calls and offering flexible solutions for daytime overflow. Whether banks need coverage when internal teams are unavailable or require support to handle high call volumes, CSI ensures no customer inquiries go unanswered.

By partnering with CSI, banks can maintain exceptional customer service around the clock, relying on experienced agents to fill critical gaps without the need to build or expand internal call centers. With the support of LinkLive, CSI delivers seamless communication experiences, allowing in-branch staff to focus on face-to-face interactions, while CSI's skilled team manages routine calls and overflow inquiries.

For Kimmee Garcia, making the move to LinkLive was an easy decision. **“Choosing LinkLive was a no-brainer. Having everything in one channel makes it so much easier for our agents—they don’t have to switch between different platforms, which keeps service smooth and efficient,”** she explained.

As the financial industry continues to evolve, CSI remains the ideal partner for banks seeking a flexible, efficient, and scalable solution for exceptional customer support.



LINKLIVE

LinkLive is the leading all-in-one, AI-enabled communications platform trusted by the world's most highly secure organizations.

📞 1.952.392.1834

✉️ team@linklive.ai

🌐 www.linklive.ai

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