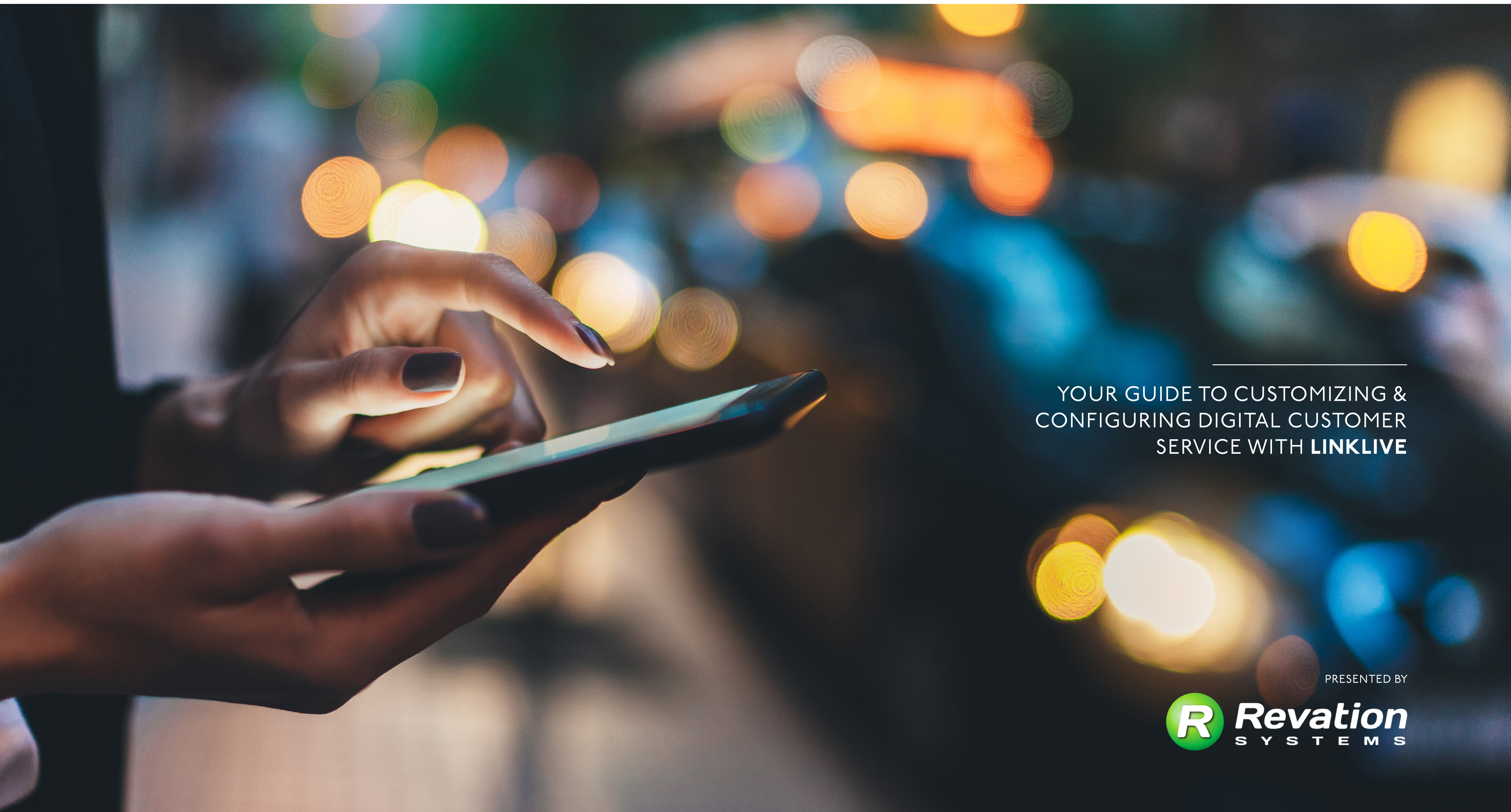
DIGITAL CUSTOMER SERVICE

Best Practices for Financial Institutions



YOUR GUIDE TO CUSTOMIZING & CONFIGURING DIGITAL CUSTOMER SERVICE WITH **LINKLIVE**

PRESENTED BY

Revation SYSTEMS

AN INTRODUCTION TO DIGITAL CUSTOMER SERVICE

COVID-19 has accelerated digital transformation across the entire financial industry. Those that do not find ways to connect with their consumers during the current digital surge put their brand and revenue at risk.

2020 changed customer service as we know it. Evolving consumer attitudes towards e-commerce and digital communication met accelerated requirements for speed and efficiency, along with a need to shift in-person tasks to online experiences. The Financial Brand reported that banks ranked their digital maturity as lower in 2020 vs 2019, a testament to the rubber-meets-the-road nature of banking in 2020.

This points to a clear need for banks to implement digital customer service channels to meet consumer needs and digital transformation initiatives.

But where banking runs the risk of becoming more transactional as digital usage increases, people still expect to bank with people. Success in the coming years will be dependent on bringing the human touch to digital banking. And the future will belong to those who can successfully bridge the divide between online and in-person experiences to connect humans in the digital surge.

Move fast, respond quickly to solve specific consumer queries.

Connect with text-based, messaging-first modes of communication.

Improve connection and interaction with consumer.

Improve digital transformation initiatives.

CONTACT THE REVATION CUSTOMER SUCCESS TEAM FOR QUESTIONS ABOUT CUSTOMIZING LINKLIVE!

CHECKLIST:
CUSTOMIZING AND CONFIGURING LINKLIVE

There are many opportunities available to customize and configure LinkLive services – and doing so will go a long way towards providing the best agent and consumer experience. Use this checklist to make the most of your LinkLive agent and consumer experience.

Service Customization

- ☐ All digital customer service applications have been defined and branded: color configuration, logos, background designs, font size and balloon backgrounds.
- ☐ All media capabilities for each hunt group have been configured.
- ☐ The deployment type of chat has been designed to match the website. (Note: many pop-out to a new tab while the best design experience offers LinkLive embedded right in your site or app.)

Notifications and Alerts

- ☐ The experience of a waiting consumer has been defined.
- ☐ Agents have been trained on visible alert and audible queue conditions within the Communicator client.
- ☐ All text, email, and communicator alerts set up.
- ☐ Automatic session routing to Supervisors and Managers has been set up.

LinkLive BANKING

Team Engagement

- ☐ Hunt Groups: The appropriate hunt groups to route chat sessions have been defined.
- ☐ Agents: Agents are mapped with the right skills. (Note: ensure chat sessions get to the person on your team with the associated skill set.)
- ☐ Service hours of operation: Service hours have been addressed and are transparent to all parties. (Note: service hours can be easily adjusted in real-time.)
- ☐ Handling after hours rules – continue to manage 1/1 relationships after hours.
- ☐ Agent scheduling: Required number of agents defined.

AM I ACCURATELY SCHEDULING AGENTS?

- Start with the average quantity of traffic you receive on your website and within digital banking applications each day each day.
- A good chat to visit ratio will vary and the ratio will decrease as your traffic increases, so understand the flow of traffic in addition to quantity.
- On average, websites that receive less than 7K visits and sign-ons per month can count on nearly 450 chats per month while 25K visits may translate to 1,200 chats per month.
- Align by quantity and timeline to ensure an accurate assessment of traffic and the hours needed for each agent per day and per hour.

Final Steps for Creating Optimal Experiences

- ☐ Test & retest your hunt groups and agent routing.
- ☐ Pre-fill and prepare your agents with proper greetings and closings.
- ☐ Define a process for exceptions.
- ☐ Assign volume and priorities for each agent.

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ABOUT REVATION SYSTEMS

We believe in the power of human relationships and that innovation in communication will connect people to help achieve financial security and live healthier lives. Revation Systems serves hundreds of healthcare and finance consumers in the U.S. with its all-in-one full contact center in the cloud with the ability to drive experience across digital and physical channels. LinkLive is unified communications software hosted in the cloud that offers a broad range of capabilities including rich digital messaging, a seamless ability to engage humans across physical and digital channels, and leading voice and video communications.

We offer the advanced, sophisticated capabilities that are expected in a contact center like skills-based routing, session recording, workforce management, agent scheduling, and quality monitoring tools. We also offer a broad range of digital capabilities: from chat, secure mail, and co-browsing to the ability for digital users to engage the physical channels and humans at a healthcare or banking organization. Since its founding in 2003, Revation has been dedicated to the belief that the quality of communications can be increased, while the costs and hassles can be decreased, using virtual communications with a cloud-based platform.

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