SUCCESS STORY | FINANCE

A prominent financial cooperative in Florida enhances audio and screen recording coverage using WxCC WFM

A complete view of interactions, ensuring accuracy in quality evaluations and compliance monitoring.

About the client

The client is a distinguished financial cooperative based in Florida, serving a large community of over 167,000 members across 19 branches. Their commitment is to provide a wide range of financial products and services, including checking accounts, savings accounts, loans, credit cards, investment services, and various online and mobile banking options, catering to the needs of their members and contributing positively to their financial well-being.

Requirements

Recently, the client migrated their contact center operations to Cisco Cloud Webex Contact Center, seeking to streamline their communication processes and enhance the member experience. The client needed a cloud-based Quality Management and Workforce Management (WFM) platform that could seamlessly integrate with the new contact center solution. The client aimed to manage call recordings, resourcing schedules, and forecast quality evaluations efficiently.

Solutions offered

Servion, in partnership with Cisco Systems, offered a comprehensive solution to meet the client's requirements. The key features of the integrated platform were as follows:

- **Calabrio Quality Management**: The solution enabled both audio and screen recording, allowing the client to capture 100% of the interactions.

- **Evaluation Forms**: Servion configured two evaluation forms for call assessments.

- **Calabrio ACD Integration**: The platform was seamlessly integrated with Webex Contact Center 2.0, automatically synchronizing users, teams, and call recordings.

- **Calabrio Data Explorer**: The client had access to a powerful dashboard and reporting tool, allowing them to monitor and analyze contact center metrics, performance, and customer interactions.

- **Workforce Management (WFM)**: The feature facilitated efficient employee scheduling, time-off management, and shift-swapping requests.

- **Historical Connector**: Servion's solution allowed the client to import historical contact center statistics data of up to one year.

- **Single Sign-On (SSO)**: The integration of SSO with Calabrio enabled secure and convenient access to the platform. Agents and supervisors could easily log in to access recorded calls and other relevant information.

Benefit

The implementation of Servion's integrated solution delivered several significant benefits to the client:

- With **100% audio and screen recording coverage**, the client gained a complete view of member interactions, ensuring accuracy in quality evaluations and compliance monitoring.

- Integrating audio recordings, contact information, screen recordings, and evaluation forms in one platform **eliminated the need for extra windows or clicks**, streamlining the user experience and saving time.

- The WFM feature empowered the client to manage employee time off, schedule shifts, and handle swapping requests effectively. This led to improved **agent productivity** and enhanced member service.

- The platform's robust reporting and dashboard capabilities enabled the client to **accurately forecast queue analytics**.