Global Banking Group

Customer Service Agent

When customers of a global banking group call to dispute a credit card transaction, they speak to Amelia in their native Spanish language. Without needing to spend lengthy periods of time online filling out a claim form, they can simply telephone the usual customer service number and be put through to Amelia. After accessing the bank's core systems to verify the customer's identity and locating the transaction being queried, Amelia creates the claim while speaking to the customer. Within the easy context of a conversation, the customer's concerns are logged and a formal claim logged in the bank's systems. Better still, a confirmation email to the customer noting the claim number for the dispute reassures them that the bank is acting fast to resolve their query.

Amelia began her first day on the job after having proved her ability to manage conversations about queries successfully; she achieved a 98% accuracy rate in training. Not only is her Spanish fluent, her comprehension of business processes is top quality too. By accessing core systems to act on the information exchanged in each contact, Amelia helps the bank move ever closer to its straight through processing targets.

In addition, Amelia is impacting the amount of calls being handled by the bank's customer service agents by also acting as a customer service filter, preventing customers from asking non-credit card related queries to live human agents who are only trained in answering credit and debit card-related calls. Amelia requests certain requisite information from the caller and if they cannot provide this information, then the call cannot be escalated to a live human agent. This encourages customers to seek out the answers to their general questions through the bank's website and allows the banking institution's human agents to remain on-task and not deviate from its operational objective in resolving complex credit card issues. To the pleasant surprise of the banking client, Amelia has managed to reach a 69% abandon rate, which is a positive metric for this particular segment of their customer service operations.

The next step will be to broaden her roles and allow her to provide a better experience for a greater number of the group's 70 million customers. At the moment she is handling 400 valid claims per month and the objective is to expand that claim volume to somewhere between 40,000 and 50,000 as Amelia helps settle credit card disputes on a global scale.

At a Glance

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