



FINANCIAL SERVICES CASE STUDY

In The World Of High Value Customers, The Stakes Are High

Visual collaboration co-browsing with Surfly helped change the game

HIGHLIGHTS

- A secure visual collaboration co-browsing solution for client engagement in financial services
- Extremely flexible to fit within the complex requirements of the banking environment
- Shortened average call times with out the loss of high customer service levels
- Created better and deeper customer engagement through the use of visual communication co-browsing

In the world of financial services, the stakes are high. According to Research and Market, the global financial services industry was valued around USD23 trillion in 2021 and over a ten-year period is expected to double to around USD45 trillion in 2031. Innovation and using technology to excel in your customer service can help obtain a competitive advantage in the industry.

When you need more from your technology

One Australian global financial services organisation is focused on positive outcomes for its clients and the team. Having the right technology to engage with its customers is a critical part of their service and how they have strengthened their reputation - delivering personalised service. However, within the customer service team, the challenge faced was difficulty in using the incumbent technology, it was having a negative impact on the banks customer service level of engagement. A better solution was needed for the two customer service teams working across three

AT A GLANCE

Industry:

- Financial Services

Country:

- Australia

Challenge:

- Secure virtual customer engagement

Solution:

- Surfly Co-Browsing

important client portals – personal banking, wealth and business.

Customer experience technology tools are a big part of the bank’s engagement model with clients. The business found the customer service agents were having issues in using the incumbent screen sharing technology with its external high value customers. The incumbent technology was complex to deploy and the process of initiating and sharing the customer display too cumbersome for both the customer and the customer service agent. This Reduced the uptake of the service and provided lower levels of engagement. The bank needed a more customer friendly solution and a technology the business could use effectively.

Changing the game with Surfly visual collaboration co-browsing

When looking for the right solution for the business, the bank needed it to be simple and easy for its customers to use and work within current processes and infrastructure. In addition, security was extremely important, the bank needed to find the right platform. Speaking with the team at Voitec, the Surfly visual collaboration co-browsing solution was found to be a far simpler and more secure co-browsing session for the bank's customers and the customer service agents.

"Visual communication using co-browsing is a great way a business can drive a competitive differentiator in the customer experience. The team at the bank needed to engage across the Wealth & Business Banking and Personal Banking portals, engaging with customers used to high levels of service. Working together with the bank to understand their business challenges, complex technical requirements and their core vision, enabled the team at Voitec to develop the right solution for their business," commented Mark Owens, Managing Director, Voitec.

The initial results have had a positive impact on the business. Customer service agents are securely and seamlessly able to guide the customer visually via co-browsing the same web page. Today, the customer service agents are finding they can initiate faster and more meaningful co-browsing sessions. The customers are also finding it easier to engage with the bank. Additionally, Surfly was extremely flexible to fit within the complex requirements of the banking environment. The Surfly visual collaboration co-browsing platform has improved the team's productivity and has been able to service the bank's customers at a much higher and personalised level.

Contact Us:

AU: 1300 884 928

SG: +65 6829 7044

Email: enquiries@voitec.com.au

Voitec is the exclusive distributor for Surfly solutions in Australia and New Zealand.

