Hitachi Solutions

Leading Financial Services Organization Elevates Contact Center with Cloud-Based CRM

Transforming Member Engagement with Advanced AI Solution

SPECIFICATIONS

INDUSTRY

- Financial Services, Insurance

DRIVERS

- Unifying operational processes for enhanced collaboration and transparency
- Streamlining case management and service delivery

PROJECT TYPE

- Contact Center Modernization

PRODUCTS

- Microsoft Dynamics 365
- Hitachi Solutions Identity Verification
- Hitachi Solutions Call Wrap Up

DEPLOYED

- United States

For over a century, this leading financial services organization has played a pivotal role in offering life insurance, retirement planning, and fraternal benefits, dedicated to improving lives and building stronger communities. Recognizing the importance of refining their contact center operations to enhance member engagement, they partnered with Hitachi Solutions to implement a cutting-edge Microsoft Dynamics 365 Customer Engagement solution enriched by AI-driven tools.

Challenge

This leading financial services organization faced several challenges in optimizing their contact center operations. Disparate legacy systems limited their ability to provide a seamless member experience across channels, leading to inefficient service delivery. Additionally, data silos scattered important information across various systems, hindering the ability to gain comprehensive insights and causing delays in response times for member inquiries. Moreover, operational inefficiencies arose as contact center agents required a more intuitive interface to reduce repetitive tasks and focus on meaningful interactions with members. There was also a critical need for dashboards that could provide real-time visibility into performance metrics and case resolutions to enhance decision-making and efficiency.

Solution

To address these challenges, Hitachi Solutions implemented a comprehensive solution centered on Microsoft Dynamics 365.

Key features included:

- Integrated Contact Center Operations: By centralizing interactions through the Case Management module, agents can efficiently document and manage member communications.

- Enhanced System Integration: Through seamless integration with Genesys Cloud and advanced IVR capabilities, the solution supports 24/7 operations for consistent service delivery.
- Actionable Dashboards: Configurable dashboards and reporting tools provide managers with real-time insights into performance metrics and case statuses, enabling proactive decision-making.
- Streamlined Processes: Hitachi Solutions' innovative IP such as Call Wrap Up and **Identity Verification** minimize manual efforts, allowing agents to focus on personalized member engagement.

The team also integrated two key solutions: **Call Wrap Up** and **Identity Verification.**

Call Wrap Up:

This tool streamlines post-call documentation processes for contact center agents by providing intelligent suggestions for call categories, summaries, and next steps. By reducing the time spent on administrative tasks, agents can focus more on customer interactions. The solution integrates seamlessly with Dynamics, ensuring precise documentation and supporting efficient call handling, particularly in high-volume environments.

Identity Verification:

This solution enhances security and cost efficiency by guiding agents through structured identity verification processes. It strengthens security measures, minimizes fraud risks, and optimizes call durations to reduce operational costs. Customizable verification steps and robust audit trails enable compliance and ensure quick, secure interactions, ultimately supporting personalized customer service.

Benefits

The implementation of Dynamics 365 and Hitachi Solutions IP has transformed the organization's contact center, delivering significant improvements:

- **Improved Member Experience:** Enhanced efficiencies lead to faster response times and increased member satisfaction.
- **Operational Efficiency:** Streamlined workflows and reduced manual tasks improve agent productivity and service delivery consistency.
- **Data-Driven Insights:** Centralized data access provides actionable insights, empowering leadership with strategic decision-making capabilities.
- **Secure and Efficient Service:** Strengthened security measures and efficient verification processes improve operational integrity and customer interactions.

Contact us to learn how we can help you!

Hitachi Solutions

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