



# Next-gen CCaaS for financial services

Improving contact center satisfaction, efficiency, and trust

Financial services organizations can dramatically improve customer experiences, achieve cost savings, and support compliance by modernizing the contact center on the Microsoft Cloud.

With deep experience in financial services and contact center automation, and a 100% focus on Microsoft technology, Hitachi Solutions provides the predictable, knowledge-driven modernization experience financial services organizations need.

## CHALLENGES

### Regulatory burden and governance

Compliance, privacy, and security concerns inhibit broad AI adoption and require complex "human-in-the-loop" processes.

### Data fragmentation

Persistent data silos get in the way of achieving a true 360-degree view of the customer, increasing Average Handle Time (AHT) and impacting First Contact Resolution (FCR).

### Scaling AI

Organizations struggle to move successful AI pilots into scaled, enterprise-wide solutions due to underlying integration and governance complexities.

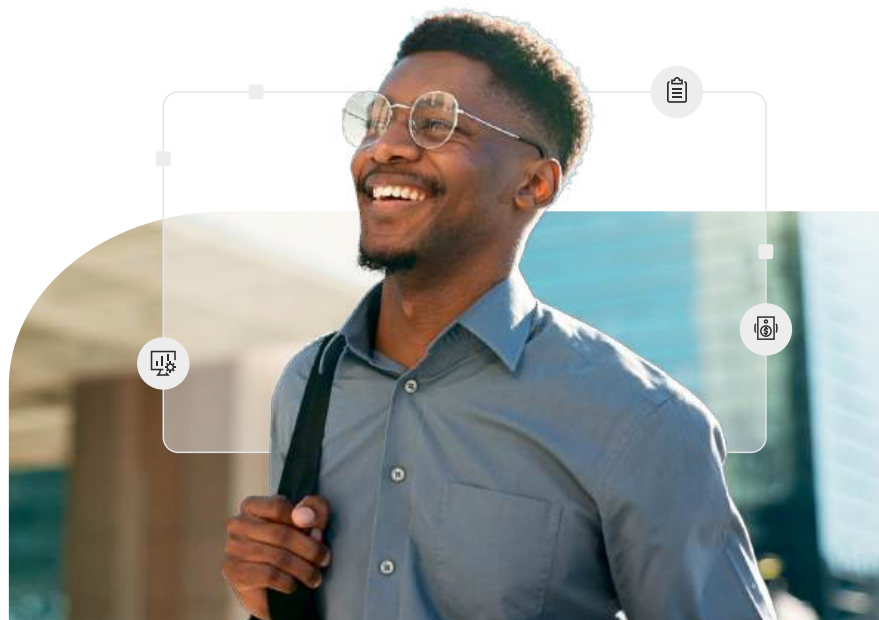
## SOLUTION

Hitachi Solutions delivers an integrated, industry-first CCaaS framework built on Microsoft Dynamics 365, Azure, and Copilot for Service for high performance and security at scale. This solution is enhanced by proprietary solutions designed specifically for financial services and contact centers. These solutions embed industry knowledge and contact center expertise developed over years of successful customer engagements to accelerate implementation and improve outcomes.



**Winner: 2025 Microsoft Copilot Studio Enterprise Agent Challenge**

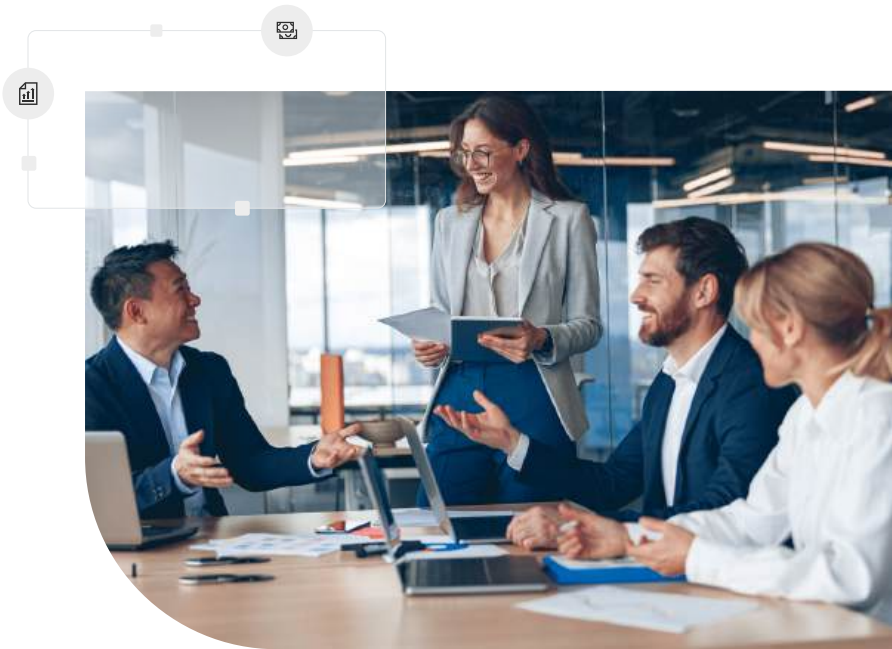
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CUSTOMER HIGHLIGHT

A leading financial services organization improved member experiences, empowered agents with data-driven insights, increased operational efficiency with Hitachi Solutions, Microsoft Dynamics 365, and our proprietary contact center solutions. See how this organization modernized to deliver secure and efficient service.

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KEY CHANGE AREAS

CONTACT CENTER ACTION

LEGACY STATE

OUTCOME

**Resolving customer issues**

Resolutions require multiple contacts and extensive agent research across disparate, siloed systems.

Most issues are handled in the first contact using a centralized 360-degree customer view and AI-driven Interactive Voice Response (IVR) and bots to automatically resolve cases.

**Post-call documentation**

Agents spend significant time on manual call categorization and documentation, leading to high AHT and inconsistent data quality.

Post-call work is streamlined using the Intelligent Call Wrap Up proprietary IP, ensuring precise, compliant documentation and reduced AHT. AI auto-categorizes cases for reporting purposes and generates new knowledge base articles.

**Sensitive inquiries and fraud**

High security risk and operational friction due to unstructured, manual identity verification processes.

The proprietary Identity Verification Tool enforces strict, auditable security protocols and optimizes call duration, turning compliance into an efficiency gain.

Hitachi Solutions

Hitachi Solutions has worked with financial services organizations around the world for over a decade, supporting cloud migration, cybersecurity transformation, and AI adoption on the Microsoft platform. We’ve also specialized in CCaaS implementation, supporting organizations across industries as they make their contact centers more responsive, efficient, and empowered.

Bringing together a wealth of technical knowledge and deep industry expertise, we bridge the gap between today’s operational realities and AI-driven opportunity. Discover why we’re trusted by leading banks, insurance companies, and other financial services organizations to support their ambitions to reimagine the customer experience.