

SUPPORTING FINANCIAL ADVISORS

Leveraging a mobile workforce to stay in constant contact with clients



Challenges

The Financial Services provider, who offers financial planning instruments, insurance products, and other investment products, experienced discontent with their clients who were struggling to connect with their Advisor. With Advisors working remotely and relying on their smartphones and homebound systems, clients couldn't keep track of availability and cell phone numbers. The contact center agents were overwhelmed trying to connect clients with Advisors, while meeting their SLA response goals.

Solutions

We deployed with their mobile workforce and created a single point of intelligent routing for all customer interactions. Thanks to the mobile app for their traveling workforce, they now have a unified view of advisor availability, status, and contact information.

- **Single contact number:** The mobile app masks the advisor's personal number, while allowing clients to reach them.
- **Reduce idle time:** Advisors can activate their status to take calls while traveling between appointments.
- **Unified routing policies:** Routing policies now cover multiple groups. When an advisor is available, they receive calls specific to their skill set. When the caller's need can be addressed through the call center, it is routed there. Consolidating routing decisions to a single platform increases sales opportunities, and eliminates customer frustration.
- **Digital channels:** In addition to calls, financial advisors, call center agents, and service technicians can communicate with clients through any channel, anytime, from a single interface.

AT A GLANCE

How a strategic partnership improved customer responsiveness, increased selling opportunities, changed customer response time, and recaptured idle downtime of independent advisors and agents.

REDUCE MISSED OPPORTUNITIES

Match client requests with assigned advisors and agents, closing the gap of missed sales opportunities

UNIFIED ROUTING

Mask personal phone numbers with a single contact number

INCREASED UTILIZATION

Align call center resources with client inquiries