



Beyond desktops: streamline customer and agent experiences

Extend your customer service
desktop simply and quickly

Even with the great strides financial services organizations have made in recent years, many still struggle to evolve service operations to a faster, easier, and more cost-efficient state. While new mobile apps may represent the “tip-of-the-spear” digitization efforts from banks, the middle and back office are still mired in manual processes, siloed data, and disjointed legacy systems that create a toilsome experience for customers and employees alike.

But there is a way for you to provide your customers with the quick service they expect – and you don’t even have to overhaul your existing solutions to make it a reality.



82% of customers are frustrated by how long it takes to receive service¹

Customer service in the contact center often starts and ends with the desktop. Unfortunately, current setups aren't doing reps any favors. The fact that most customers still think service takes too long means that financial services organizations must improve not just their time-to-resolution, but the underlying systems that power inquiry resolution. **Existing and legacy desktops are simply not cutting it.** Reps can find themselves switching between applications up to 1,100 times daily.

Out-of-the-box solutions aren't agile enough to help reps resolve requests quickly and efficiently. Customer service representatives must manually review customer email requests and determine where to route the issue. They are toggling through multiple screens and applications to resolve rote tasks that bog them down and prevent them from spending energy on the complex tasks that truly require their attention. With so much effort required to complete a single workflow, many agents cannot provide the exceptional service customers expect.

Friction leads to frustration

Multiple core systems and unstructured applications make it challenging to get work done and introduce the possibility for human error. And 48% of agents are frustrated with passing customers between teams or departments. With manual processes and siloed departments, employees face a great deal of friction when attempting to provide the service experiences customers demand. And you can bet that customers share in the frustration this friction creates.² With competition from Fintech and Bigtech on the rise and customer loyalty declining, **too much is at stake to let friction drive your customers away.**

Amplify your application with automation

You don't have to abandon your existing customer service applications in order to bridge the gap between your present and future-state desktop. While your current customer service desktop's capabilities might feel limited, powerful extenders can enhance your existing systems with automation. Here are a few ways automation improves the service experience for both customers and the reps that support them:

Efficiency

Eliminate rote work: Automate repetitive, routine tasks and simplify processes to effectively move customer requests to resolution. Routing work correctly and removing manual steps using business rules and natural language processing (without human intervention) both eliminates wasted time and focuses your staff on truly valuable tasks.

Visibility

Evolve to transparency: Keep all stakeholders – customers, front office, and back office – in the loop on work that continues after the conversation is over. Meeting service levels not only delivers on your brand promise, but in many cases, ensures that you adhere to regulatory requirements.

Speed and satisfaction

Embrace customer outcomes: Apply intelligent automation like case management, workflow, or robotics to connect the customer experience to your contact center operations, tying disparate systems together into a cohesive end-to-end experience. Freeing up agents to truly listen to customers, without worrying about keystrokes and process steps, is essential for delivering amazing service.

¹ <https://www.pegacom/2019-customer-service-insights>

² <https://www.pegacom/insights/resources/key-standout-service-keep-your-agents-happy>

How to make it real (and get real results)

Pega's case management and intelligent automation capabilities help you get more from your existing desktop. You don't have to ditch your legacy system to deliver the level of service you are trying to achieve. With Pega capabilities augmenting your current applications, the improvements and potential cost savings will pay dividends. Here's how Pega will help you get results:

Drive inquiries into your existing desktop with email and document bots. Apply automation to "read" requests, extract information, and determine sentiment so work can be either completed automatically or correctly routed for human intervention.

Streamline agent interactions using the existing desktop with attended RPA. Robotic automation supports "start my day" assisted sign-on, consolidated customer views, and call wrap – reducing routine efforts by employees to access or update information across multiple systems and applications.

Manage and execute front-to-back office requests from the existing desktop with dynamic case management that lets you get work done across a wide spectrum to ensure SLAs are met and work is compliant with regulations. Whether from an oversight role or full automation, you can automate as much or as little of the work as needed with straight-through processing.

Many service institutions have extended their desktop to achieve excellent results, including:

- **Reducing authorization time from 2 minutes to 5 seconds**
- **Improving first contact resolution by 6 percentage points**
- **Achieving a 20% reduction in back-office headcount**
- **Consolidating over 40 legacy systems and streamlined over 13 million transactions per year**

Three ways to extend your existing desktop / CRM with Pega



1. Into

Drive existing inquiries into your desktop



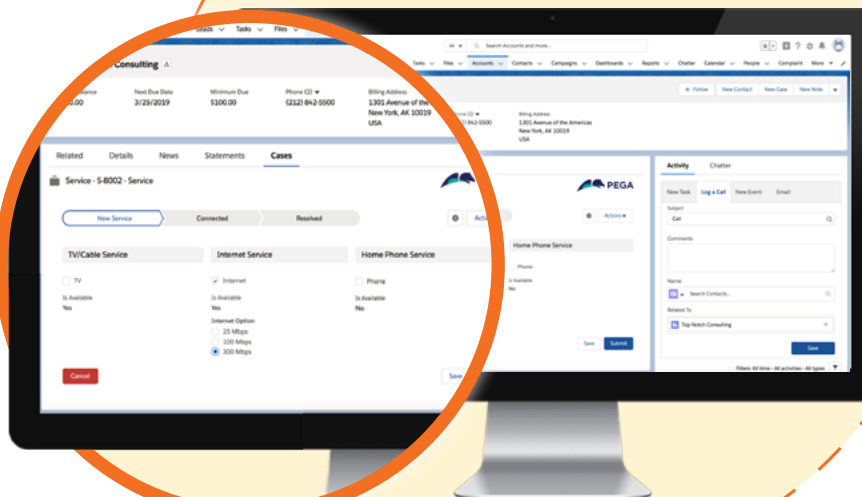
2. With

Streamline agent interactions with the existing desktop



3. From

Manage & execute requests from the existing desktop





"To be a digital bank, it is not enough to digitalize interaction points with customers, it is also important to digitalize processes."

– Hakan Aran
CIO & Deputy CEO of Digital Banking, İşBank

Who's getting it right?

Industry leaders are already embracing this approach, with dramatic results.



As part of its mission to transform, National Australia Bank uses Pega desktop automation for work optimization and natural language text analytics for intelligent and skills-based routing.

[Learn more](#)



Using Pega Robotics and Workforce Intelligence, Radial optimized its contact center, speeding up common processes from minutes to seconds and reducing call handle times to 30 seconds.

[Learn more](#)



With the Pega Platform, RBC developed an end-to-end problem resolution process that spans all channels and lines of business to reduce complexity, improve productivity and enhance client satisfaction.

[Learn more](#)



Don't be left behind.

Learn more about how financial institutions are delivering streamlined service for employees and customers alike. Visit us at:
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