



Contact Center modernization for leading independent **broker dealer**

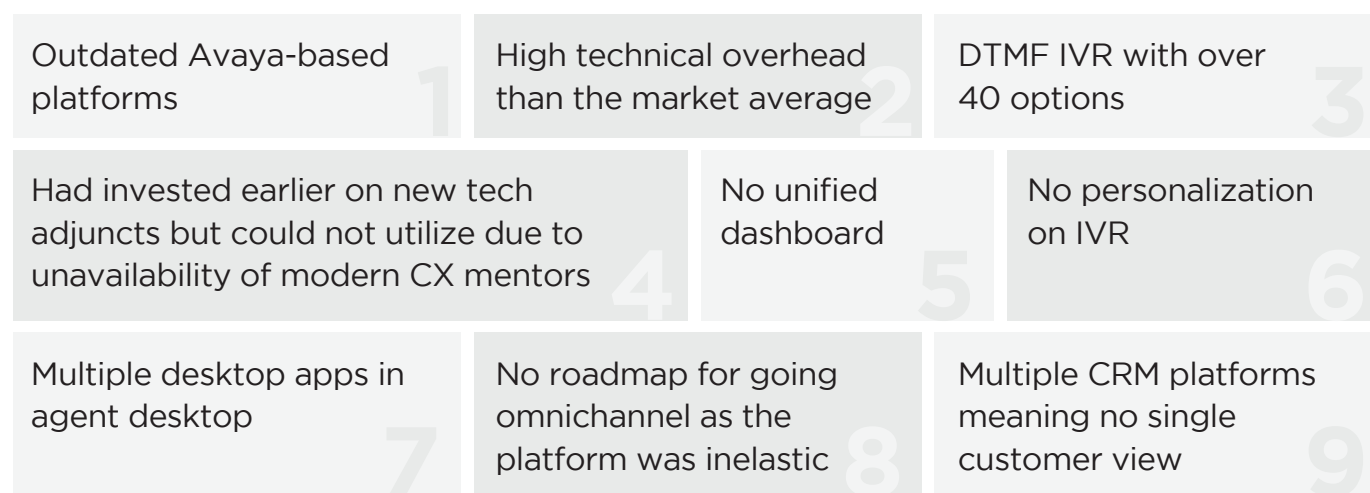


www.hcltech.com

Customer Description

As leading independent broker-dealer, this customer offers an integrated platform of proprietary technology, brokerage, and investment advisor services to more than 20,000 financial professionals and approximately 700 financial institutions. They also support more than 6,000 other financial professionals with customized clearing solutions, advisory platforms, and technology.

Challenges



In summary, the legacy contact center platform was not budging to adapt with modern customer experience paradigms.

Scope of Services




HCL Solution

Solution Overview

This customer partnered with HCL to modernize their customer experience in a manner that customer experience and agent experience changed in a managed and delightful manner. Now, they have customers enjoying a significantly shorter time spent on unproductive IVR menus and queues. Learn how they ventured into this modernization journey with our cloud contact center solution.


Solution



Cloud-based modern contact center platform-
Nice InContact




Virtual agent capability - Nuance
Speech on Cloud



Work-from-home enablement



Workforce management- Nice
WFM



Caller personalization- CRM
integration for virtual agent,
call-back implementation on
queue and website




Desktop consolidation- SSO
implementation


Solution Highlights



Cloud-based contact center with cloud-based virtual agent technology

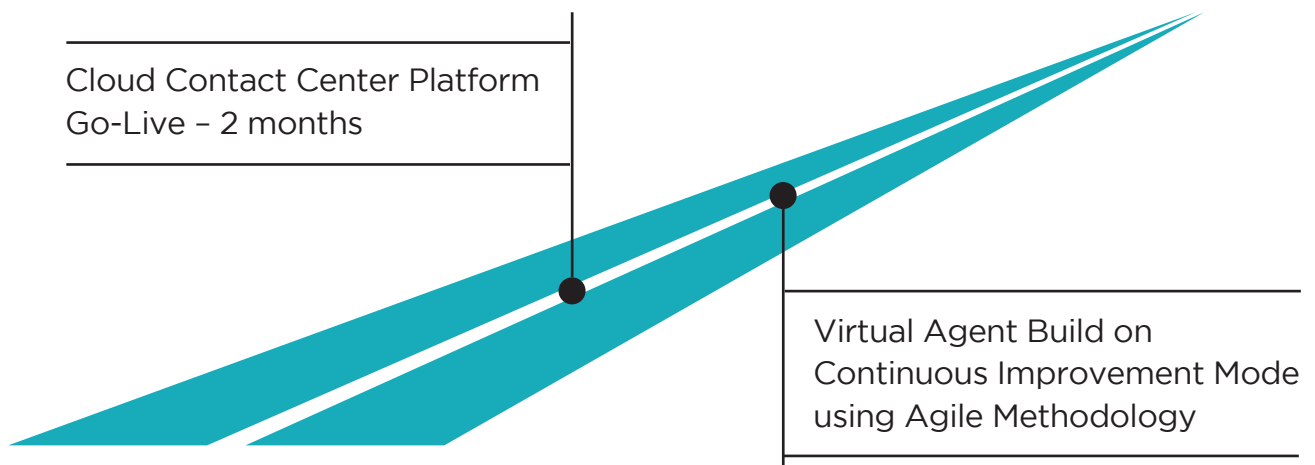


Migration done by moving to hybrid contact center architecture with on-premises on the older platform and cloud on the newer platform



Large DTMF IVR migrated to hybrid (DTMF + Speech)-based virtual agent

Key Milestones



Value Delivered

Customer Experience



Fluid.Plat solution currently provides PSTN voice but the platform is ready for unified queues for email, web chat, and other social channels for customer experience improvement



CRM Connector allows to identify registered customers and provides preferential treatment based on the customer category



AI:1 Solution is a hybrid speech-based virtual agent that uniformly connects the caller to the right queue in less than 30 seconds with DTMF fall-back



If the waiting time for the queue is more than 3 minutes, the caller is offered a call back

Agent Experience

Manual Caller Identification by Agent Not Required unless callers call from non-registered phones which is hardly 1% of caller. Identification is now handled by the virtual agent

Agent.X provides a WebRTC-based solution that can be used by the agent to login from home and handle omnichannel interactions

IT Experience



Fluid.Plat, with its open ecosystem, ensured innovation readiness with future plans to enable omnichannel services, sentiment-based quality management, predictive marketing, etc.



Now, most changes happen on the next business day, translating to improvements in customer experience and business agility