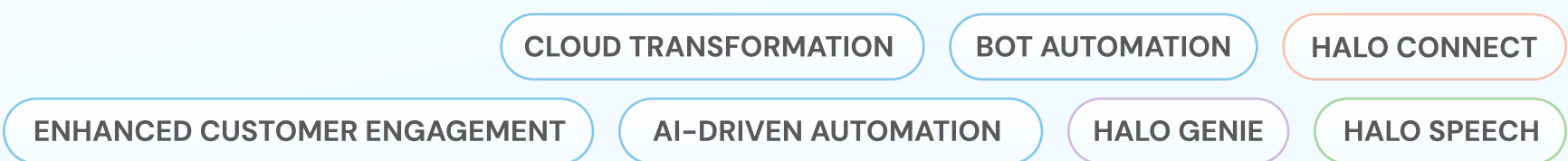


Optimizing Inbound CX for a Financial Conglomerate

Driving Efficiency and Enhancing Customer Experience with Ubona's Cloud Platform.



Case Study Overview

Problem

A leading financial conglomerate faced challenges in delivering seamless customer experiences through its legacy on-premise contact center. The outdated system resulted in:

- High operational costs
- Scalability limitations
- Long response times requiring significant human intervention
- Inconsistent customer engagement with limited automation



About the Client

One of India's premier financial services groups, the client offers diverse solutions in insurance, asset management, and lending. With over 1,000 branches and 200,000+ agents, they cater to millions of customers across the country.

Approach

- **Scalable Operations:** Ubona's cloud platform enabled seamless migration from an on-premise contact center to a cloud-based solution, ensuring scalability and efficiency.
- **Automation with HALO Genie:** The AI-powered multimedia bot automated over 30+ processes, improving response times and reducing agent workload.
- **Enhanced Engagement with HALO Connect:** The end-to-end managed omnichannel Contact Center as a Service (CCaaS) ensured smooth inbound and outbound interactions across customer touchpoints.
- **Actionable Insights with HALO Speech:** Advanced speech analytics and call data management solutions empowered the company with real-time insights, optimizing customer interactions.
- **Cloud-based Flexibility:** The solution provided flexibility to run operations from anywhere, anytime, ensuring uninterrupted service and improved customer engagement.

Solution

- **Scalable Cloud Contact Center:** Managed 350+ agents across 4 locations, ensuring smooth inbound service operations.
- **Enhanced Outbound Services:** Supported 750+ agents with improved outreach strategies for better customer engagement.
- **AI-Driven Automation:** Deployed 140+ AI-powered voice bots to automate customer interactions, improving response times and efficiency.
- **Real-Time Insights:** Integrated advanced speech analytics to enable performance tracking, enhanced decision-making, and proactive customer support.
- **Operational Impact:** Successfully handled over 4.5 million calls monthly via the cloud platform, ensuring uninterrupted service with 99.9% uptime.
- **Cost Efficiency:** Achieved a 50% reduction in operational costs by optimizing resources and leveraging automation.
- **Customer Satisfaction:** Improved inquiry fulfillment rates to 60%+ through self-service bots, contributing to a steady increase in NPS (Net Promoter Score).