SUCCESS STORY: UBI BANCA

Reaching out to web visitors: right time, right channel, right agent

Fair and efficient work distribution boosts customer and agent satisfaction gains

Accommodating customers’ busy lifestyles

UBI Banca blends tradition with innovation. With around four million customers, 18,000 staff and 1700 branches, its priorities include building solid customer relationships and capital strength, backed by operational efficiency and attentive risk control. Contact centers play an increasingly important role because many customers prefer to bank online or using their mobiles, at a time that fits their busy lifestyles.

Enrico Ugoletti, Head of Direct Channel Business Services, says: “The virtual customer experience has to equal the one they get at the branch. That means providing fast access to experts and consistent, personalized service across all touchpoints – web, mobile, and social media.”

However, different channels had evolved organically and in a way that was not completely integrated. That meant it was hard to get a single view of customers and their needs. So UBI Banca decided to develop a new omnichannel customer service model.

Redesigning systems around customer journeys

UBI Banca implemented a Genesys Customer Experience platform. Ugoletti explains: “When it came to choosing a partner we felt Genesys was the only player with a true end-to-end solution offering the right capabilities and scalability.”

In addition, Genesys worked with the bank to understand the nature of incoming inquiries and analyze customers’ journeys to improve them. This led to the decision of deploying a unique toll free number that works as a single point of contact to manage all customers’ requests and extending the service support on a 24x7 basis.

Customer: UBI Banca
Industry: Financial Services
Location: Italy
Company Size: 18,000+ staff including 400 agents
Challenges:
• Retain and attract clients
• Move to omnichannel banking
Solutions:
• Genesys Customer Experience Platform
• Genesys Digital Channels
• Genesys Self-Service
• Genesys Agent Desktop
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In this context, around 70 percent of standard inquiries, like bank balance requests, are now handled by a unique Genesys Self-Service platform. The remaining 30 percent go directly to the agent best placed to deal with the customer’s specific issue.

Channels cooperate for smart outcomes

The addition of Genesys Proactive Engagement combines real-time behavioral analytics with historical customer interaction and transaction data. This enables UBI Banca to determine the right time to engage web visitors, over the right channel, using the right agent.

“If a customer is surfing our website we can see the products that interest them most and propose to start a dialogue using chat or voice” says Ugoletti. “That’s very powerful.”

This proactive engagement model makes it easier to target and promote products. Ugoletti explains: “Often the best way of taking a conversation forward is to schedule an appointment for the customer to visit their local branch. It’s a great example of two channels cooperating for a smart business outcome and confirms the importance of personal interaction in most relevant customers’ lifecycle events.”

This new operating model is also helping UBI Banca improve acquisition and churn rates, through the development of new contact center sites that are specialized in managing proactively the retention of existing customers. UBI also plans to extend its Genesys Customer Experience Platform and develop similar proactive engagement models for mobile and social media channels.

ABOUT GENESYS

Genesys® powers more than 25 billion of the world’s best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes. Genesys on-premise and cloud solutions are built to be fluid, instinctive and profoundly empowering. Combining the best of technology and human ingenuity, we work the way you think.

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