

Personal finance software provider uses customer engagement cloud solution to more easily deliver a superior customer experience



Quicken

Customer: Quicken Inc.

www.quicken.com

Industry: Financial services

Challenges:

- Eliminate need for heavy IT support to manage customer experience
- Offer all necessary functionality at a price that fit new budget.

Solutions:

- [PureCloud](#)

Easy to manage, cost-effective cloud solution for a changing business

When Quicken Inc. was a unit of Intuit Inc., the personal finance software business could rely on dozens of IT professionals to deploy and customize its contact center solutions. But when Quicken separated from Intuit in early 2016, the company's customer care team realized it needed its own contact center solution—one that didn't require hand-holding from IT.

"We didn't have the technology team to support customer care the way we were used to—like helping us with call routing, uploading IVRs or adding chat to our website," explains Ian Roberts, operations leader for Quicken.

To fit its new style of doing business, the smaller and leaner company needed a contact center solution that was not only easy to manage, but more cost-effective and could grow with

the company. Roberts also wanted to add omnichannel features like screen-sharing and chat to help agents provide faster, more effective service.

Fast-to-deploy, month-to-month subscription model and continuous delivery of new features make purecloud an easy decision

After considering solutions from several providers, Quicken chose PureCloud by Genesys, a public cloud solution offering customer engagement, communications and collaboration functionality. Because PureCloud was based on microservice architecture running atop the Amazon Web Services Cloud, it offered the reliability and flexibility Quicken needed to quickly and cost-effectively add services.

“In a world where customer service expectations are changing at lightning speed, PureCloud gives us a serious competitive advantage.”

Ian Roberts, Operations Leader, Quicken Customer Care

“PureCloud gave us reliable, continuous delivery of new functionality so we could keep pace with customer demand—and on flexible, month-to-month subscription terms,” Roberts says.

Quicken also liked the Genesys personal touch. “Genesys understood our business better than anyone else, and what it would take to delight our customers,” Roberts says.

PureCloud also gave Quicken the rapid deployment it needed. “We’ve spent up to a year to deploy previous enterprise systems,” Roberts says. “We deployed PureCloud within two months, which was faster than we expected.”

Adaptable contact center solution meets today’s and tomorrow’s customer service needs

“With PureCloud, the biggest change for us was how easily we could control the customer experience,” Roberts says. “We added new messages to our IVR in just a couple of minutes,

which is something almost unheard of in our industry. And we did this without relying on IT experts.”

Quicken also liked that PureCloud is a solution for the future. “Already we’ve used PureCloud to add new features such as screen sharing to provide better service,” Roberts says. “But the real beauty of PureCloud is that it’s constantly incorporating the latest and greatest so however customer expectations change, we can adapt—and do it quickly and cost-effectively.”

About Quicken Inc.

Quicken Inc., a top personal money management software provider, has been the trusted financial solution for millions of consumers. Its product line includes solutions for Mac and Windows users, as well as a mobile app to give consumers anytime, anywhere access to their finances.

www.quicken.com

RESULTS

2-Month

deployment

Continuous

delivery of new functionality

Flexible

month-to-month subscription terms

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