

# Growing financial services firm delivers on next-gen customer demands with PureCloud by Genesys

Open, flexible cloud architecture combined with rich, comprehensive functionality result in an improved customer experience and increased efficiencies



**Customer:** Rapid Financial Solutions

**Website:** [www.rpdfin.com/](http://www.rpdfin.com/)

**Headquarters:** North Logan, Utah, U.S.A.

**Year Founded:** 2005

**Industry:** Financial Services

**Number of Customers:** About 1 million total cardholders; about 500,000 active cardholders with about 50,000 added each month

**Number of Employees:** 48

**Number of Contact Center Agents:**

Eight full-time; three to four additional on-call agents

**Number of Contact Center Locations:** One

Rapid Financial Solutions was founded in 2005 as a prepaid card program manager and card processor for the Sport Officiating Industry under the auspice of RefPay.com. In 2008, Rapid sold a controlling interest in RefPay to the NCAA. Since then, Rapid has expanded into additional industries and applications. With expertise in banking, software development and operations, Rapid works with businesses to provide complete end-to-end payment solutions.

[PureCloud by Genesys](#) has enabled Rapid to streamline contact center systems and improve integration for a better customer experience, more satisfied agents and increased efficiencies.

The open, flexible PureCloud architecture and comprehensive functionality have helped Rapid deliver on a modern customer experience strategy, while minimizing resource requirements.

## Contact center can't keep up with complexity

While the expansion of the Rapid Financial Solutions business brought increasing success, it also led to more complexity. Unfortunately, the company's existing IVR and [contact center systems](#) were proving less and less capable of supporting such growth.

"As we began offering more products to more clients, it became obvious that our existing contact center infrastructure would not keep up," said Darren Jackson, CEO at Rapid Financial Systems. "Complex user requirements, unreliable metrics, and lack of automation and scalability were hurting our ability to provide a superior customer experience, while also compromising efficiencies."

### Challenges:

- Complex system and lack of comprehensive features can't support growth
- Limited integration and multiple systems result in slower service and increased agent turnover
- Lack of true cloud architecture and comprehensive contact center suite mean distributed employees can't be supported and customer retention and upselling opportunities suffer

### Solutions Used:

- PureCloud by Genesys, a unified, all-in-one cloud customer engagement and employee collaboration platform for small to mid-sized organizations
- PureCloud for Salesforce integrated with IVR

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### Darren Jackson

Chief Executive Officer  
Rapid Financial Systems

At the time, Rapid was using an IVR system by Plum Voice. Although the IVR functionality was decent, it proved difficult to manage and didn't easily tie into CRM systems. It also didn't offer the kind of broader contact center functionality Rapid needed to continue on its growth path.

### Poor integration among multiple systems hurts agent and customer satisfaction

Rapid had experimented with integration between its IVR and other CRM systems but found the results frustrating. “We did some API work to achieve integration but it wasn't working the way we wanted, which meant our agents were still doing too much manual work,” said Jackson.

Rapid also needed a way to aggregate data from multiple systems and unify its agent desktops. “Our agents had to learn four different systems,” said Jackson. “This meant lengthy training cycles and an unfriendly user experience. The result? Less satisfied agents, higher turnover, and slower service.”

### Lack of true cloud architecture and broader functionality impact growth and effectiveness

While Plum Voice was cloud-based, Rapid found its architecture less than pure cloud. “Our PBX functionality wasn't cloud-based so our agents still needed physical phones,” said Jackson. “This also meant serious challenges giving single system access to our widely distributed global sales and service employees.”

Rapid was also in need of broader contact center functionality. “We were getting about 50,000 new customers each month and were doing nothing to proactively retain them or upsell,” said Jackson. “It was clear that to get these customers into our marketing and sales funnel we needed full inbound and outbound functionality. We also had to improve on reporting. While we had a reporting tool, it was so difficult to extract data—and often with unreliable results—that the effort wasn't worth the outcome.”

## Genesys replaces Plum Voice, beats out Avaya

Rapid looked at the top handful of vendors, including Avaya and Genesys, based on industry analyst reports from Gartner and others. In addition to a broad and deep feature-set, Rapid wanted to make sure the new system ran on the most advanced cloud architecture for speed of deployment, flexible integration options and ease of use.

“We ultimately selected [PureCloud](#) by Genesys because of its open, all-in-one cloud architecture based on Amazon Web Services,” said Jackson.

“It was a lot like Salesforce with its advanced design and intuitive user interfaces. It also included a wealth of customer engagement features, including a PureCloud by Salesforce integration and a robust and flexible IVR.”

Rapid also liked that Genesys had a reputation for being a leader in innovation, according to Jackson. “If you pick an industry leader that's always been ahead of the curve in innovation, it's pretty certain you'll get a partner that will be around for a very long time and one positioned to help you grow however your customer and business requirements change. Genesys was that partner for us.”

### AccelInfo creates game-changing synergies

A critical part of the PureCloud deployment was the role that Canadian-based IT consulting firm [AccelInfo](#) played.

“The AccelInfo specialization in Salesforce CRM and IVR for banking, combined with its experience deploying PureCloud, made them an obvious choice as our integration partner,” Jackson said.

Jackson also points to the AccelInfo business process orientation. “I gave AccelInfo our high-level vision and they were able to apply the right technology in the right way to deliver on that vision,” he said. “With AccelInfo and Genesys, we really have the perfect trifecta of vision, the right architectural foundation, and the most modern applications. This synergy is a real game-changer.”

“We interact with a lot of customers but few have the vision that Rapid has,” said Alan Halabi, General Manager at AccelInfo. “Because of this vision, we're constantly learning and pushing our own boundaries. This has made working with Rapid especially satisfying.”

### PureCloud for Salesforce integrated with IVR

With the help of AccelInfo, Rapid deployed PureCloud at its contact center using the PureCloud for Salesforce app, which was also tightly integrated with the PureCloud IVR. The company is also using PureCloud reporting and supervisory functionality. Today, PureCloud helps Rapid contact center agents handle about 700 calls per day.

As a true cloud solution, Rapid was able to get rid of its phones and, armed only with a computer and headset, give agents full call control capabilities.

The [PureCloud for Salesforce app](#) embeds PureCloud call controls inside the Salesforce interface. With aggregated data pulled from four back-end systems, agents now have detailed customer information at their fingertips within a single interface.

“So much of what we used to do required manual extraction of data. PureCloud gives us a ton of out-of-the-box reporting functionality, and because it’s pre-integrated with the rest of our contact center infrastructure, we know it’s accurate. This means less time extracting data, and more time analyzing results to improve efficiencies and service.”

**Darren Jackson**  
Chief Executive Officer  
Rapid Financial Systems

Further empowering agents to assist customers is the PureCloud IVR and Salesforce integration. This gives them details about the customer journey from the outset—from the menu options customers selected, to how long they’ve been in queue.

The PureCloud IVR deployment also resulted in a new Spanish language option, as well as new and streamlined menus. The menus now include self-service options that let customers hear transaction details, change their PIN, upgrade to reloadable cards, check card balances, order or block cards, and more.

Rapid is also using PureCloud recording, reporting and supervisory functionality. This enables contact center managers to listen in on and review calls. They can also see queue activity such as average wait and call times.

## Consolidation of systems results in improved service, happier agents

The aggregation and automation of data via the PureCloud CRM integration has resulted in major benefit.

“The PureCloud for Salesforce app has given us a one-stop location for agents to view customer information, transfer calls, and otherwise more efficiently handle interactions,” said Jackson. “This has not only reduced call handle time, but improved the effectiveness of our service. The net result is happier agents and happier customers.”

This has also led to a reduction in agent training time, which has improved operational efficiencies.

### PureCloud IVR integration increases efficiencies

The PureCloud IVR integration has further enhanced benefit. “Today, about 30 percent of our callers use the self-service option instead of live help,” said Jackson. “That’s freed up more agents to handle live interactions, which means even greater internal efficiencies. The new Spanish language option and more effectively getting callers to the right department have added to these benefits.”

The PureCloud architecture has also made changes to the IVR fast and easy. “The ease of PureCloud configuration has increased our speed to market,” said Jackson. “We’ve been able to call AccelInfo and tell them, ‘Hey, we need an IVR menu change or new queue’ and we can typically get it in a day or two. We now look at any customer service process to determine if we can make it more efficient by dropping it into PureCloud. This has given us an important competitive edge.”

### More accurate metrics, improved visibility contribute to success

With accurate contact center metrics Rapid is also now able to better support company objectives. “We can now set measurable key performance indicators for the entire customer journey so we can effectively incent agents to better support our company’s success,” said Jackson.

New supervisory and reporting capabilities have given Rapid better insight into call activity and agent performance, which has further improved customer service and efficiencies.

“Our agent performance has improved with the PureCloud supervisory dashboard that lets contact center managers listen in on and review calls,” said Jackson. “They can also see queue activity such as average wait and call times. This has enabled us to employ a ‘float’ agent who can work on higher level projects while queue activity is manageable, and when queue levels jump, that person can log into the queue. Simply put, better use of resources means increased efficiencies.”

While Rapid is just beginning to scratch the surface of the PureCloud reporting capabilities, already it’s seeing major potential. “So much of what we used to do required manual extraction of data,” said Jackson. “PureCloud gives us a ton of out-of-the-box reporting functionality, and because it’s pre-integrated with the rest of our contact center infrastructure, we know it’s accurate. This means less time extracting data, and more time analyzing results to improve efficiencies and service.”

The icing on the cake, according to Jackson, are the PureCloud PCI compliance standards. “As a financial services provider we have to meet stringent compliance requirements,” he said. “It gives us great peace of mind to know that PureCloud has met the highest standard of consumer credit card security standards.”

## Virtual branch, other planned enhancements make customer experience a competitive advantage

As Rapid explores new ways to use PureCloud, it sees an even brighter future. “PureCloud has been like going from a Yugo to a Cadillac,” Jackson said. “We’ve already gotten so much from its out-of-the-box features, but we know we’ve only scratched the surface. For instance, as we better understand the power of the PureCloud analytics, we’d like to do more proactively—particularly with outgoing calls—to get new customers into our marketing and sales

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**Darren Jackson**, Chief Executive Officer, Rapid Financial Systems

funnels. This is an enormous opportunity to increase customer retention and upselling.”

Rapid also has plans to use the PureCloud chat feature and is looking at social media integration. An especially innovative feature under development is a 3D virtual branch integrated with PureCloud, which is the brainchild of AcceInfo.

The AcceInfo virtual branch enables customers to visit a branch online. The branch is tied to a bank’s contact center and other backend systems so agents can effectively interact with customers. Live chat and voice/video options are also available.

“We’re really excited about the AcceInfo virtual branch integration with PureCloud,” said Jackson. “We know banking as a whole is moving toward a digital model with millennials increasingly expecting services of all kinds to be delivered virtually. To offer this in a deeply interactive and personalized way really puts us ahead of the competition.”

The idea of a virtual branch, among other Rapid plans for enhancements, fits nicely within its customer experience vision, according to Jackson.

“We’re still a small, relatively young company so we feel like we’re just growing up,” he said. “Despite our youth, we know that customer engagement is essential to delivering value. The technology behind PureCloud is powerful enough to give us what we need for an effective customer engagement strategy without draining resources.”

## About AcceInfo

AcceInfo is a Canadian IT consulting company with over 20 years of experience in Customer Relationship Management (CRM), specializing in the top CRM platforms. AcceInfo is business partners with Salesforce, Microsoft Dynamics CRM and Interactive Intelligence which was recently acquired by Genesys. The staff’s expertise includes building CRM systems for contact centers, branches, and sales organizations of banks and financial institutions. AcceInfo also specialize in innovative ideas such as our 3D virtual branch.



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