



Integrated service with reductions in costs, gains in productivity, and improved customer experience in a SIP environment.

Banco Itaú

Banco Itaú is the largest private financial conglomerate in the Southern Hemisphere and is among the largest banks in the world, with operations in 20 countries, more than 4000 branches, and approximately 40,000 service points relying on the 24-hour network in Brazil and the world, in addition to the Itaú 30-hour service, through which the customer can make inquiries, payments, investments, and other banking operations using his or her mobile phone, the Internet, and land line without needing to resort to the manager.

Itaú is a commercial retail bank offering a wide range of banking products and services to a diverse base of individuals and legal entities, whether or not holders of accounts at the bank. Its product portfolio includes, among others, credit and several investment, insurance, foreign exchange, and brokerage options.

With earnings in excess of R\$15 billion in 2013, Itaú has over 95,000 employees.

QUICK GLANCE

Itaú Unibanco Holding S/A
www.itaú.com.br

Industry: **Banking**

Net Profit (4Q2013)

+ R\$4.68 billion

Service positions:

+ 20,000 in Brazil

Number of customers:

+ 40 million

Volume of calls:

+ 2 million per day

“With the solutions Genesys has implemented, we are managing to achieve our goals of improving availability and making technological developments.”

ALVARO TORRES
TELECOM

About the Genesys project deployed at the bank

Seeking to evolve its service platform and to optimize technology and infrastructure management, in 2013 Banco Itaú implemented several improvements in its infrastructure, comprising:

- Availability - infrastructure centralized in data centers and high-availability components;
- Improved efficiency - data center occupancy optimization (SIP technology);
- Unified Framework - unify its customer service operations, enabling synchronous transfers (data/context) between the different products/services;
- Improvement in Management - evolution of the reporting and KPI solution (Info Mart);
- Support for new features (Digital Channels - multi-channel customer service), unifying the various non-integrated channels (chat, email, SMS) into a fully integrated Genesys environment.

Challenges

To reduce technology management and infrastructure costs, Banco Itaú needed to integrate service operations under a single platform. The solution the bank had in mind would have to facilitate operation management, yet increase operational productivity and improve customer service and satisfaction. Therefore, the bank substituted a traditional technology available on the market, with CTI integration and non-integrated multi-channel solutions, for a fully integrated Genesys environment. This allowed service operation unification, separating internal and outsourced operation management and control, and innovating with a SIP environment in customer service, transparently and without risk to the business.

Solución

A market leader in the Contact Center segment, and with integration and interoperability solutions, Genesys was the partner chosen to integrate the various forms of contact at the Banco Itaú Customer Service Centers.

In order to reach the productivity and satisfaction levels the Bank was in pursuit of, the following Genesys solutions have been deployed:

- Genesys Customer Experience Platform
- Genesys Contact Center Modernization
- Genesys Reporting & Analytics
- Genesys Digital Channels (SMS, chat, email)



**Dow Jones
Sustainability Indexes**

- The only Latin American bank that has been listed on the index since its inception, in 1999.
- Top score in the banking industry in 3 criteria.

CHALLENGES

- Integrate customer service operations into one platform
- Simplify operations management
- Increase productivity and customer satisfaction

SOLUTIONS

- Genesys Customer Experience Platform
- Genesys Contact Center Modernization
- Genesys Reporting & Analytics
- Genesys Digital Channels

RESULTS

- Centralized customer service operations
- Increased efficiency and productivity
- Reduced infrastructure and optimized platform availability

“Genesys is helping us meet the challenge of integrating all types of contacts, centralizing the various media into a unified, robust, and scalable environment.”

CARLOS TRUFFA,
TELECOM

Results

With the deployment of the Genesys solutions, the bank reached its efficiency gain targets, improved performance and data integration among the operations, which went on to have their transfers identified, made a significant reduction in its infrastructure, and improved its platform availability index, over and beyond having evolved its SIP technology platform, integrated with the legacy TDM environment, without risk to the business. Besides the infrastructure, its workforce was also optimized and attained major gains in productivity. With all of this, the bank gained greater visibility and integration among the various service operations in a central manner, with segregated control among the internal and outsourced operations, while yet maintaining indices that are aligned to the market's standards.

Next steps

Since the operations have been integrated and results achieved, the bank plans to proceed with the implementation of solutions aimed to reduce infrastructure, costs, and to standardize and streamline the Contact Center architecture. Parallely, initiatives such as innovative customer service solutions are also being widely implemented.



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About Genesys

Genesys, the world's #1 Customer Experience Platform, empowers companies to create exceptional omnichannel experiences, journeys and relationships. For over 25 years, we have put the customer at the center of all we do, and we passionately believe that great customer engagement drives great business outcomes. Genesys is trusted by over 4,700 customers in 120 countries, to orchestrate over 24 billion contact center interactions per year in the cloud and on premises.

Visit us at www.genesys.com or call us at +1.888.436.3797

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