



CALL DEFLECTION AND CSAT IMPROVEMENT

# Regional Bank Deflects 36% of Contact Center Calls with Digital Self-Service Options Integrated in its IVR Tree



Massive cost reductions achieved with automated digital options for common tasks like balance inquiries and payment status integrated in IVR.

## Background

A regional bank saw customer support costs rise rapidly due to COVID and increased employee attrition. In addition to the added costs, the bank's CSAT ratings had declined as longer waits and less experienced team members slowed average handle times.

While the bank was committed to offering human support to those who wanted it, they saw an opportunity to power faster resolutions with self-service.

They came to Callvu to solve the problem quickly and drive significant adoption.

### Program Goals:

- Deploy fully integrated digital self-service experiences for multiple use cases in less than 150 days.
- Develop a process that did NOT require a software download
- Ensure fast and secure identify verification and an intuitive workflow
- Create experiences fully aligned with the bank branding,

## Highlights

**<90 DAYS**

Dev  
/Implementation

**36%**

Decrease in  
Call Volume

**80+%**

Top Box  
Satisfaction

**\$3M**

Reduction in  
Support Costs

## Solution

The bank used Callvu to create simple, fully-branded visual workflows for several of the most common call center queries. Processes were added as IVR options.

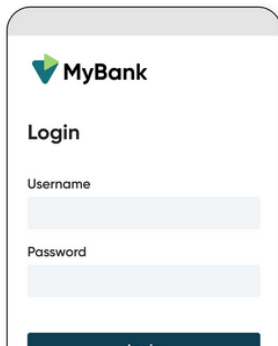
Process links were delivered via SMS to users opting into digital self-service. Clicking the links opened secure mobile-web pages with simple directions on how to get the information they wanted. Process completion time across all experiences averaged <2 minutes.

Encouraged by the simplicity and high completion rates for these experiences, the bank decided to integrate the links into their bank website and customer portal. This helped deflect even more calls and increased repeat visits to the portal.

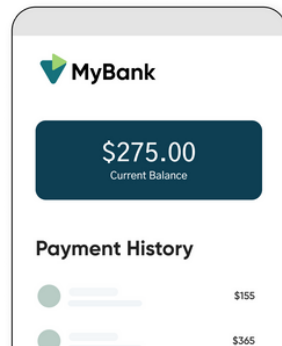
Based on early results, the bank boosted the number of automated digital self-service experiences for increased satisfaction and call deflection.

### Digital CX Automation Examples

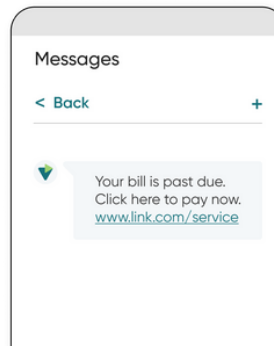
Authentication



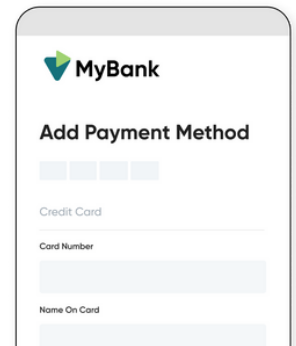
account history



Proactive Service



Secure Payments



## Results

The project was completed two months before the target date. Within the first quarter of implementation, adoption of the digital self-service processes reduced call center volumes by more than 15%. This figure later rose to 36%. This enabled the bank to boost CSAT scores and cut support costs while reducing average hold time by more than 2 minutes.

- Project completed two months early
- 36% reduction in call volume due to self-service adoption
- Restoration of CSAT scores to historical levels
- \$3M+ in customer support costs saved in the first 12 months