



SPEED TASK RESOLUTION WITH OMNICHANNEL

# Bank Cuts Time to Completion for 750K+ Approvals Per Year With Omni Channel Digital Self-Service



Mid-sized national bank helped customers complete essential legal tasks days faster with mobile-compatible e-sig and acknowledgements.

## Background

A mid-sized international bank had deployed digital self-service disclosure acknowledgments and signatures on their customer portal. This improved convenience for customers, but there were still an average of 2 days between requests for customer actions and compliance.

When agents called customers to remind them to sign, they found that 30-40% of customers were in their cars commuting in this traffic-clogged country.

The client wanted to offer these time-saving legal steps on smartphones, but

their internal team lacked mobile development resources to complete the project.

### Program Goals:

- Enable customers to acknowledge disclosures and e-sign agreements through mobile devices.
- Make processes available to both app users and non-users.
- Empower customers to access processes via audio commands while driving.

## Highlights

### <2 MOS

All Experiences Deployed in <60 Days



Any OS No App Required

### 750K

Year One Sessions Automated/Mobilized

### 74%

Reduction in Average Wait Time for Legal Sign-offs.

## Solution

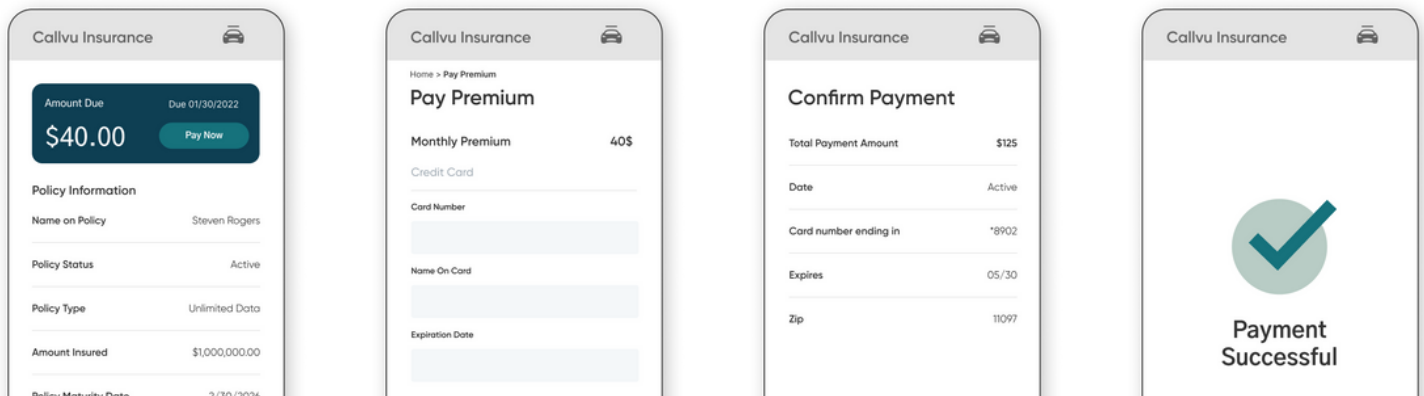
The bank used the Callvu platform to quickly design and deploy mobile document acknowledgment and e-signature mini-applications for Mobile.

Developed and deployed in less than six weeks, these driving-friendly Callvu processes were delivered via platform-agnostic text links. Because customers could access these links immediately (if passengers) or upon stopping (if driving,) legal approvals could be secured within minutes.

Upon seeing the ease and simplicity of Callvu mobile capabilities, the bank decided to expand the deployment across more touchpoints.

The bank incorporated these experiences in retail workflows so that customers could e-sign documents in real-time while working with branch personnel. They were also woven into call center workflows to reduce average handle time.

### Digital CX Automation Examples



## Results

The omnichannel experiences helped cut processing time for critical processes and eliminate customer friction. They solved the crucial challenge of securing approvals while customers were on the move. This helped cut process abandon rates for sales processes and dramatically reduced average handle time for complex contact center engagements

- 750,000+ uses within the first year
- 74% reduction in average wait time for legal approvals from prospects and customers
- Approved loan acceptance rate increased by 9% by reducing abandons
- Entire project completed in less than two months