

# ice Contact Center for Banking & Financial Services

Financial institutions have been the pioneers in the adoption of technology to service their clients and provide personalized customer experiences. Customer service is of high importance to build loyalty with clients and ensure they are getting the best service.



Secure and reliable transactions between customers and financial institutions continues to grow and evolve. What started with simple self-service solutions over the phone has advanced to include banking and financial management via web and smartphone apps. Provide clients with secure and convenient access to information and transactions from wherever they happen to be and from whatever device they have in front of them.

Trusted by:



## Sample Applications

- Account Inquiry
- Bill Payments
- Check Orders
- Credit Card Activation
- Credit Card Account Inquiry
- Funds Transfer
- Investment Bank
- Loan by Phone
- Mortgage/Loan Account Inquiry
- Mutual Fund/Annuity Account Management
- Outbound Past Due Payment Handling

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## How ice Contact Center Helps Banking & Financial Service Organizations



### Give clients peace of mind with credit card security



Clients will not have to worry about saying their credit card numbers over the phone with ice's secure Payment Card Industry Data (PCI) compliant IVR-based cloud service. Accept credit card payments without storing any sensitive cardholder data in your environment for both self-service and agent-assisted inquiries.



### Reach customers on their preferred channels

Omnichannel capabilities allow customers to contact you on their preferred channel while allowing contact center users to answer interactions on one platform. Connect multiple communications channels to your contact center including web chat, social media, SMS, and more.

### Prioritize select clientele



Put high-touch customers, members, or urgent cases at the front of the queue when calling into your organization. iceWorkflow Designer allows organizations to make configuration changes for high priority clients. To decrease the number of times customers are transferred, they can be routed to the appropriate user based on their role and service history.



### Modernize your systems

Old systems and technology can hinder your employee efficiencies. ice Contact Center can migrate your existing systems to a modern solution with real-time monitoring, historical reporting, access to chat transcriptions and call recordings, and more. Equip staff with the tools they need to increase customer satisfaction by moving to an updated platform.

### Make informed data-driven decisions



To help you make informed organizational decisions and effectively strategize for the future, ice provides over 100 in-depth historical contact center reports, equipping you with the data you need. Reports are configurable and can be scheduled to run at certain times and to be emailed to specific individuals or groups.

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### Enhance customer experiences with CRM integrations

Provide personalized customer experiences for clientele with ice's CRM integration. Agents can personalize interactions based on customer communication preferences as well as prior behavior, recent transactions, and open and closed tickets.



### Increase agent efficiencies with relevant customer information

Screen pops automatically display the most relevant customer information within a CRM or ticketing system. Once users are connected with the customer, they can immediately start the interactions using the customer information and knowledge presented. This saves users time searching for contact and case information.



### Better understand customer needs

With multimedia surveys, receive feedback on your services to enhance customer experiences. Improve business operations through benchmarking satisfaction levels while listening to your customers to make their experience even better.



### Empower customers to access and modify their accounts without assistance

Allow clients to find information and perform tasks such as account inquiries or credit card balances using a self-serve voice IVR without the need for a contact center user. Users are not required to get involved and the customer can create tickets, complete transactions, gather information, and push their information to users if need be.



### Save time repeating answers to common questions

Chatbots can be configured to provide customers with responses to Frequently Asked Questions (FAQ). Agents can save time from responding to common questions, allowing them to focus on other essential tasks and handle urgent inquiries.



## Banking & Financial Service Customer Success Stories

### Centralized Agent Management to Extend Hours of Operation at a Bank

A bank group operated individually across multiple time zones and were not connected through any network. This caused customers to have longer wait times as all the phone lines were dispersed. ice Contact Center helped the bank unite its agents into one virtual queue environment to fully leverage their centralized services. By consolidating the agents' separate phone lines into a toll-free number, customers can call in and connect to whichever agent is available. This allows agents to be more accessible and extends their hours of operation for greater customer service.

### Reduce Unanswered Calls at an Investment Bank

A leading Canadian investment bank with worldwide clients had a phone system where traders were missing calls and customers were prompted to voicemail when other traders were available. The investment bank had an increase in customer dissatisfaction, which impacted their client relationships. When the organization decided to work with ComputerTalk, 250 traders with turret terminals started using ice Contact Center. ice allowed all calls to be presented to all traders any time the market is open. This change led to all calls being serviced and allowed any trader to answer any call at any time with no calls missed.

### Easily Retrieve Data at a Financial Services Company

A Canadian bank used ice Contact Center to increase first-call resolution and reduce instances of caller transfers, holds, and callbacks. The bank had been experiencing inefficiencies that negatively impacted both agent and customer experiences. A custom web-based interface connector was built with ice to connect the contact center application to their database. This connection allowed agents to easily access and navigate all industry-related information. Today, data retrieval is so quick that agents can remain in a natural dialogue with callers and guide them on next steps without missing a beat.

### Offload Agents and Simplify FAQ at a Trade Association

A trade association's IVR menu was slow and took a long time for patrons to navigate. Customer service representatives were frustrated as they spent a lot of time answering common, repetitive questions due to customers bypassing the IVR menu and pressing 0 to speak with an agent. When the organization migrated their contact center to ice, they streamlined customer service by introducing a unique feature that allows callers to speak their needs instead of dialing on a keypad. Their most extensive number of inbound calls were people requesting information about interest rates and exchange rates. Using IVR and text-to-speech functionality, the association can play back the responses to these requests, offloading agents to focus on solving more significant problems.



## About Us

ComputerTalk is the developer of ice Contact Center. ice modernizes the call center with business application integrations, AI, and analytics across all communication channels, helping organizations deliver outstanding customer experiences. As a Microsoft Teams native contact center solution, ice allows users to handle all interactions within a single interface. Founded in 1987 and headquartered in Markham, Canada, ComputerTalk powers enterprise-class contact centers for organizations across the globe.

For more information, visit us at [computer-talk.com](https://computer-talk.com).

