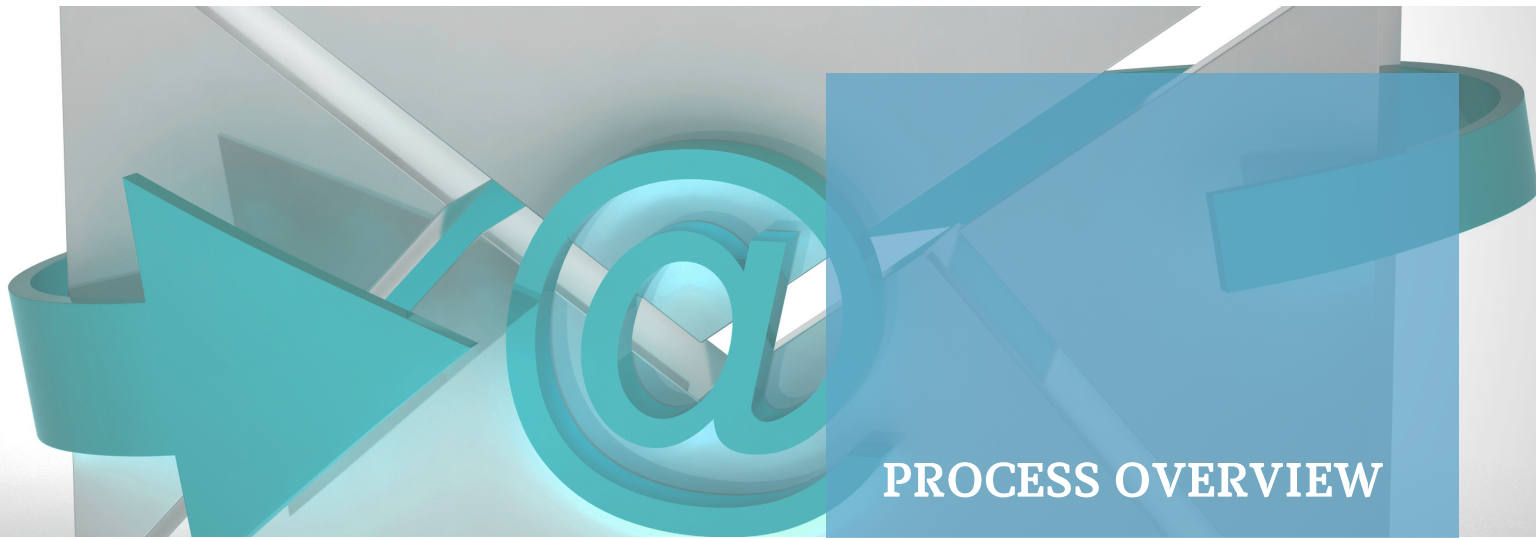


EMAIL AUTOMATION

A leading financial services company



PROCESS OVERVIEW

- Manual processing of emails
- Agent classifies the email.
- There were 70 case categories and 155 subcategories.
- Customer data spread across multiple applications.

Challenges

As a listed financial services company , they receive about 4,00,000 emails a month.

Client was already using email ticketing system to log the tickets created from e-mail and manage the tickets.

There were three main challenges faced by the customer service team

1. As business scaled, they needed more resources to support and serve the customers through e-mails.
2. Current first response time and resolution time was really high.
3. Customer Data was dispersed across various internal systems.

The Solution

A digital middleware was used to integrate the clients business application. It integrated the trading application with CircleOne email ticketing application.

CircleOne intelligent case management now intercepts all e-mails in the support inbox. Once received the email it automates the below business scenarios

- User e-mail authentication to understand registered and unregistered customers
- Using natural language processing it understands the underlying context
- Based on the context the e-mails are classified and tagged automatically in to relevant categories .
- Based on the relevant categories it triggers relevant business processes and achieves straight through processing without any manual intervention
- The bot automatically creates a ticket in the CircleOne
- It pre-populates the automated response to agent for approval.
- Agents approves the communication where it will be auto replied to customers.
- Ticket will be marked as resolved post customer confirmation.

Results

- 73 % of data extraction automated
- 61 % of cases are STP with no manual intervention
- 99% emails are auto classified
- Customer experience is improving with faster resolution time.