

# Harel Group

## Opportunity

As Israel's largest insurance and finance group, Harel Group has 1,900 agents spread across six locations. Given the company's breadth of products, including health insurance, life and non-life insurance, pension funds, mutual funds, and more, the company's contact centre handles inquiries spanning every stage of the product lifecycle. From providing information and generating sales leads, to assisting with claims and payments, to helping customers with the company's digital channels, Harel Group's customer experience (CX) team needs to be always on, responsive, and armed with the right know-how and information.

Until recently, Harel Group relied on a customer relationship management (CRM) platform to gather business intelligence and insights. However, with a growing business and customer base, it became clear that richer insights were needed to tackle critical business challenges including call efficiency, customer satisfaction, and churn. It also wanted a deeper understanding of why its customers were calling, what their pain points were, and what could be done to improve CX and drive digital transformation and efficient self-service.

While the company knew that customer calls contained valuable insights, the sheer volume of calls and subsequent insights meant the CX team needed a more robust system that would be sophisticated enough to deliver real-time analysis with speed, depth, and clarity.

## Solution

To better understand its customers' needs and expectations, Harel Group implemented Verint® Workforce Engagement™ technology in phases. It started with Verint Speech Analytics™. Powered by Verint Da Vinci™ AI and Analytics, the solution transcribes calls to automatically discover and analyse words, phrases, categories, and themes to uncover customer sentiment trends and insights.

"Of the solutions and vendors we considered, Verint's AI-powered speech analytics, with sophisticated semantic intelligence and machine learning, stood out because it was able to transcribe words based on context, not just using phonemes," shares Tami Grossman, Vice President of Customer Service at Harel Group. "The Verint solution is also extremely user-friendly and intuitive to navigate."

The company migrated calls from its legacy recording platform onto the Verint platform, which also included Verint Enterprise Recording™ and Verint Quality Management™, for transcription and analysis. Once complete, and with the Verint solutions fully integrated, the CX team could now seamlessly monitor calls and identify areas of opportunity or concern in real time.

"The Verint solution is a manager's dream," says Grossman. "Because the system is unified, managers can monitor their team and the overall contact centre environment – see screen recordings, listen to calls, track call categories, quickly zoom in on interesting parts of calls, and complete evaluation forms about calls or agents – effortlessly from a single screen."

# VERINT®

## Customer Success Story



### Solutions

Verint® Speech Analytics™  
Verint Enterprise Recording™  
Verint Quality Management™



### Industry

Financial Services  
Insurance



### Region

APAC

## Results

- Uncovered real-time customer sentiment trends and insights to identify areas of opportunity or concern.
- Streamlined performance monitoring on a single integrated platform for more efficient agent training and evaluation.
- Gained a deeper understanding of customer needs and expectations to improve customer satisfaction and reduce churn.



“The Verint solution is a manager’s dream. Because the system is unified, managers can monitor their team and the overall contact centre environment – see screen recordings, listen to calls, track call categories, quickly zoom in on interesting parts of calls, and complete evaluation forms about calls or agents – effortlessly from a single screen.”



– Tami Grossman, Vice President of Customer Service, Harel Group

## Benefits

With Verint’s integrated customer engagement platform, it is now easier for team leaders to evaluate calls and improve agent performance. “Before, team leaders had to go through a manual process of sifting through calls for performance review,” explains Grossman. “Today, it is super easy to find the ‘golden call’ by using all available parameters to find exactly what is needed. For example, if the leader needs to find a long call with escalation, it can be done in one click. Once found, the evaluation process is much faster since the leader does not have to listen to the entire call. The transcription can be used to bubble up the right terms to get to the most relevant parts of the call.”

The added efficiency has resulted in more targeted and timely coaching for agents to improve CX and reduce instances of escalation. “We frequently use the system to make sure our agents are communicating the right information in the right way,” Grossman adds. “With Verint, the entire process of identifying and correcting issues takes only a matter of days.”

More recently, there was special interest in understanding the evolution of customer needs and concerns due to COVID-19. With insights gleaned from the Verint platform, Harel Group was able to pinpoint its customers’ key concerns and address them in a timely, effective, and proactive manner.

“Using Verint, we found that our customers were very emotional and afraid for their money,” notes Grossman. “We understood that we needed to make sure our agents communicated effectively to customers that we are a transparent company, and that our aim above all is to help them through the crisis. We also changed our website and digital channels for easier navigation, so that customers could quickly find the information they needed, and we sent pamphlets to employers with useful information they could share with their employees.”

Harel Group continues to work closely with Verint’s professional services team, frequently consulting them on how to improve use of the Verint system to drive further results and ROI. Grossman concludes, “The Verint consulting team is always available to help us find the right solutions and answer any questions we have. We’ve been really satisfied with the team’s accessibility and quality of service.”



Learn more about  
**Verint Customer Engagement Solutions**  
at [www.verint.com/engagement](http://www.verint.com/engagement)

## The Customer Engagement Company™

Americas

[info@verint.com](mailto:info@verint.com)

1-800-4VERINT

Europe, Middle East & Africa

[info.emea@verint.com](mailto:info.emea@verint.com)

+44(0) 1932 839500

Asia Pacific

[info.apac@verint.com](mailto:info.apac@verint.com)

+ (852) 2797 5678



[verint.com](http://verint.com)



[twitter.com/verint](https://twitter.com/verint)



[facebook.com/verint](https://facebook.com/verint)



[blog.verint.com](http://blog.verint.com)