

De Volksbank

Customer Success Story

Opportunity

The products, services, and terms and conditions of banks and insurance companies can be quite complicated. In turn, employees within banking and insurance organizations often struggle to accurately address customer inquiries with consistency. Recognizing this challenge, de Volksbank set out to enable its employees, both those working in its contact center and those working in its branch locations, to deliver crystal clear answers to questions, regardless of complexity, every single time.

De Volksbank's road to a new, in-house client management system started with the integration of all applications that contained client information.

"Our employees had to access up to 17 systems to collect all the information they needed," says Ben Roosenthaler, Product Owner of the CRM system at de Volksbank. "We took on the internal challenge of integrating all of this into a single application."

The application contains everything de Volksbank knows about its clients, such as personal information, products purchased, and details of previous contact with customer support.

Solution

The performance of de Volksbank's client management system improved even further with the company's adoption of Verint® Knowledge Management™.

"We integrated our client management system with Verint Knowledge Management," Roosenthaler notes. "This is the database where employees search for answers to questions, which can then be linked to the client with a single click. Should the same client call back or contact us via a different channel, all employees can see the answer that was given last time."

Finding a powerful knowledge base to integrate with de Volksbank's client management system was quite a challenge, adds Mischa de Rover, Project Manager at de Volksbank. "We really wanted to keep our own client management system. It was working just fine. However, many companies wanted to give us an end-to-end solution that could not easily integrate with our own client management system. This meant replacing our in-house solution altogether. Thankfully, we found Verint Knowledge Management, which was capable of working with our existing applications."

While de Volksbank was keen on integrating a knowledge base, it wanted more than out-of-the-box features and functionality. It wanted a solution it could easily tailor and modify to meet its business needs.

VERINT®



Solutions

Verint® Knowledge Management™



Industry

Financial Services



Region

Netherlands

Results

- Significant jump in customer satisfaction after only three weeks.
- Easy retrieval of client histories.
- Consistent standard answers to most customer inquiries.

“ We did not need conversations to speed up, but we did need them to improve in quality. With the combination of our client management system and Verint Knowledge Management, this goal was achieved – and we saw customer satisfaction go through the roof after only three weeks.”

– Ben Roosenthaler, Product Owner of the CRM system, de Volksbank

“We had quite a number of demands regarding the database,” says Roosenthaler. “First, it needed to be able to accommodate a great deal of information we share with our clients. In addition, we needed to be able to address constant shifts in our business and situations such as a client saying ‘last year you told me something different.’ This required an ability to easily modify pages within the knowledge base and having a contact history on every page.”

Verint Knowledge Management helped de Volksbank address these requirements and more. In fact, whereas employees manually formulated and typed answers to questions in the past, leaving room for inconsistency and misinterpretation, Verint’s solution provides consistent standard answers to most questions.

Benefits

A key step in integrating de Volksbank’s client management system and Verint Knowledge Management was ensuring that the knowledge base contained the right client information.

“This enables the employee to proceed to the knowledge base directly from the client file,” Roosenthaler notes. “All kinds of information is already being filtered out.”

The knowledge base is also inherently suitable for de Volksbank’s other banking brands, such as Zwitserleven. If a Zwitserleven customer calls, the client management system pre-sorts the knowledge base and automatically directs the employee to the Zwitserleven section.

This integration enables employees to provide customers with correct information about all aspects of their business with de Volksbank.

“We have travel insurance policies with worldwide coverage and European coverage,” Roosenthaler continues. “With the integration of our client management system and Verint Knowledge Management, we know which insurance policy this specific client has and the employee is directed to the correct policy terms. The employee can no longer accidentally access the wrong policy information.”

Employees mainly benefit from the system in terms of peace of mind, Roosenthaler concludes. “Employees are quicker to find answers. Thanks to the client management system, they have greater insight into clients’ products and previous inquiries. We did not need conversations to speed up, but we did need them to improve in quality. With the combination of our client management system and Verint Knowledge Management, this goal was achieved – and we saw customer satisfaction go through the roof after only three weeks.”

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