



How to meet high customer expectations by empowering advisors

Banks & financial institutions The challenge

#1 Decreasing contact frequency in a highly competitive environment

Customer
Digital friendly, impatient

- Expects convenience and instantaneity
- Needs support from an experienced advisor for life moments

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Advisor
Multi task, multi skill

- Growing number of digital interactions
- Increasing customer's portfolio

Unsatisfying and frustrating interactions leading to an erosion of the relationship

#2 Efficiently manage customer service emails to enhance satisfaction

96% say customer service plays a role in loyalty to a brand
Source: Forrester - 2018 Customer Service Trends

82% of customers consider quick resolution as the most important aspect of customer service
Source: Pega - 2019 global customer service insights

High expectations towards customer service
Email channel continues to grow

333 billions emails will be sent daily in 2022
Source: Statista, 2019

62% of customers want to communicate with companies via email for customer service
Source: HubSpot Research, Consumer Support Survey, Q2 2018

Automate low-stake interactions

Relieve advisors from time-consuming tasks to improve service levels and customer satisfaction

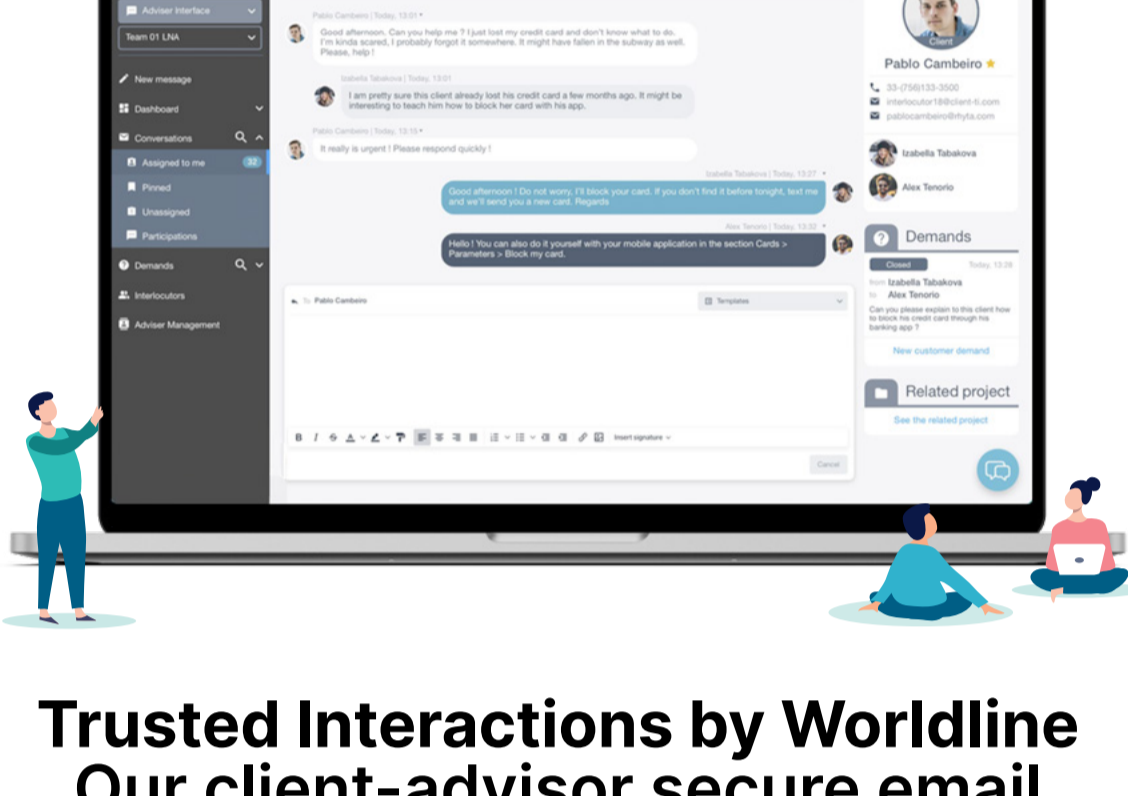
Manage workload

Optimize your capability to efficiently handle requests

Focus on high-stake interactions

Devote human time and expertise to your customers and ultimately reinforce brand engagement and loyalty

#3 WL Trusted Interactions toolbox to assist advisors in their daily work



Trusted Interactions by Worldline Our client-advisor secure email messaging product enhanced with tools to improve advisor efficiency

Security by design

State-of-the-art standards & protocols to ensure their data privacy and network security, GDPR compliance, EU datacenters

Monitoring and supervision

Customized dashboards and reports to control your costs while improving your performance, customers' satisfaction evolution report

Customer servicing tools

Secure web portal for end-customers, Whatsapp* interactions, direct access for advisor and interactions, sentiment analysis*
*: next release

Team work

Advisors collaboration tools: experts support requests, internal notes, absence management, workload balancing, skill-based routing

AI-augmented advisors

Pre-prepared answers powered by semantic analysis, chatbot FAQ support for advisors

Document management

Online sharing and validation of the documents uploaded for a project, digital signature

Marketing and communication tools

Marketing campaign management, smart alerting, dedicated access for prospects

They trust us




more than

200 million

secure mailboxes

from

1 week

deployment

adaptability from product to

tailor-made

#4 Leverage human expertise and reinvent loyalty

After having a positive experience with a company

77% would recommend it to a friend

Source: Temkin group

Convenient support

- Physical and cross-channel experience
- Customer service reachable by email

High quality services

- Security/privacy protection
- Personalization
- Fast and qualitative answers

Trusted relationship

High quality services +

- Hyper-relevance (data collection)
- Human touch (cognitive, sympathy)
- Advised based relationship
- Financial well-being

Customer engagement growth
Trusted interactions by Worldline

And you?
At what stage of customer engagement do you position yourself?
Whatever your maturity level or ambition
Worldline can assist you