VidyoEngage for Genesys in Financial Services

Video-enable your Genesys PureEngage customer experience for a competitive edge

Use Cases

- **Account servicing:** Enable agents to engage more effectively with customers to solve problems quickly

- **Account opening:** Establish trust and engage face-to-face with customers to reduce abandonment rates

- **In-branch kiosks:** Offer your branch visitors faster service and easier access to subject matter experts

- **Loan origination:** Simplify the application process, build confidence, and bring in the right expertise to maximize the probability of closing a deal

- **Claims management:** Expedite the claim process and improve loss adjuster productivity with remote video assessment of damages

Benefits

- **Grow revenue:** Increase customer acquisition and foster up-selling and cross-selling to deepen your share of wallet

- **Delight customers:** Offer quicker and better service to ultimately increase Net Promoter Score, customer satisfaction, and loyalty

- **Reduce costs:** Reduce average handling time, increase first call resolution rate, and optimize staff utilization across the entire organization

- **Improve job satisfaction:** Make the agent's role more rewarding and lower the turnover

Business Challenge

As branch traffic declines and financial services institutions leverage self-service tools and AI capabilities to reduce servicing costs, the contact center plays an increasingly strategic role:

- It has become a powerful revenue driver as it is now often the only human interaction point for many branchless transactions, even the most complex ones.

- It plays a critical role in moments of truth. When emotions are running high, the quality of the interaction is critical in resolving the issue and maintaining loyalty.

However, traditional channels — such as phone, text chat, or email — do not allow the level of personal interaction that more complex or emotionally driven tasks require. It is difficult to deal with unhappy or angry customers over the phone or text chat, or to establish a trusting relationship that encourages the customer to go beyond their initial inquiry and discuss more of their needs.

To overcome these challenges, many financial institutions want to add video capability to their contact center so agents can engage in a more personal way with users of their banking websites, mobile banking apps, and in-branch kiosks.

The video channel has to be seamlessly integrated with all other channels in order to provide a true omnichannel experience. Therefore, if you built your contact center on the cutting-edge Genesys PureEngage™ customer experience platform, you want to add video to this environment without disrupting your agent and customer communication routine.

Vidyo Solution

VidyoEngage for Genesys™ enables organizations that use a Genesys PureEngage platform to add a personal touch to their contact center and elevate customer-agent interactions.

Financial institutions can leverage the unique capabilities of the PureEngage platform, including global visibility of all customer interactions, hyper-personalized routing, proactive customer engagement, consistent workforce management, and advanced integration capabilities. By adding Vidyo to their omnichannel solution, these organizations reap the benefits of the most robust video communication engine:

- Highest video and audio quality over any network (public internet, Wi-Fi, 3G/4G) and device (desktop, mobile, kiosks)

- Point-to-point and multipoint video communication

- Content sharing for a richer integration

- Video recording for agent training or compliance

- High security, availability, and scalability

The solution supports three essential video interaction scenarios:

- **Click-to-video:** The customer presses a button on the website or mobile app to initiate a video call that gets routed to the best-suited agent.

- **Voice escalation to video:** During a phone conversation, the agent can offer to continue the conversation over video when the interaction can benefit from a higher engagement.

- **Text chat escalation to video:** A similar scenario, where the inquiry starts over text chat and is escalated to a video conversation to enable a richer interaction.

It also combines the power of video with Genesys customer-experience artificial intelligence to enable use cases such as predictive routing of high-value inquiries to video-enabled agents, escalation of a chatbot conversation to a face-to-face interaction when the need is identified, or escalation to video as a suggested "next best action."

Results

Video improves communication and understanding so agents can resolve tickets more quickly, increase customer satisfaction and Net Promoter Scores, uncover up-sell and cross-sell opportunities, and effectively meet other KPIs.

The seamless integration of the video channel into the Genesys environment guarantees a frictionless experience for both agents and customers. It also offers a comprehensive view of all customer interactions so you can effectively allocate resources and consistently monitor the performance of the video channel against other channels.

Feature Overview

Integrated Experience
Click-to-call options can be integrated into banking website, mobile applications, and self-service kiosks

Easy Escalation
Escalation to video from chat or phone conversations

WebRTC Support
Frictionless in-browser experience without any download for customers using a WebRTC browser

Call Recording
Optional SIP-based recording with integration with Verint

White-Label User Experience
Professionally branded and customized video channel experience

Screenshot Documents
Ability to take a snapshot of an identity document

Branded Customer Queue
Branded waiting treatments, such as advertisement videos

High-Quality Audio/Video
Designed with the member in mind — seamless experience to join, High-quality audio and video replicates an in-person meeting experience

Document Sharing
Ability to share content from any application or screen, and customizable settings to limit sharing to specific applications in order to increase privacy and security and meet

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