Avaya OneCloud CCaaS for Financial Services

Competition and challenges in Financial Services never ease up and never slow down. From banking to insurance, to accounting firms and stock brokerages, there is growing complexity, security, and regulatory requirements. The requirements often make it hard to give customers the reliable and instant anywhere, anytime access they expect.

Avaya OneCloud CCaaS for Financial Services is composed to address the security, resiliency, and sophisticated operating model of financial institutions. To achieve this composition, Avaya OneCloud includes an extensive ecosystem of global industry solution leaders.

Avaya OneCloud CCaaS for Financial Services allows organizations to respond and interact with customers, communicate more effectively to deliver top customer service while retaining and selling valued-added services while making colleagues effective and knowledgeable.

Avaya OneCloud Financial Service solutions help organizations:

- Attract and retain customers with superior customer service.

- Improve employee productivity while increasing customer loyalty.

- Reduce mortgage, credit, payment, and loan delinquencies.

- Grow high value services and revenue through branches, agencies, and brokerages.

- Improve the customer experience proactively across all touch points.

Avaya OneCloud CCaaS for Financial Services add-on bundles give organizations the flexibility to address business requirements. Pre-defined bundles simplify the solution delivery, streamlining and enabling effortless convenience for enterprise workloads, with accurate and verifiable billing.

Voice Agent Bundle

Overview

Voice Agent Bundle provides access to set of contact center services, communication services, platform hosting, management, and operations.

The Voice Agent Bundle is procured based on a Concurrent Agent model using the high watermark of a measured period.

Professional services for the configuration, personalization, integrations, and on-boarding of agents are available based on a Statement of Work.

Voice Agent Bundle summary

- A suite of communications services for voice call routing and digital interaction routing, rules-based segmentation engine, API and CRM connectors.

- A suite of Interactive Voice Response / Intelligent Voice Automation (IVR / IVA) services scaled for each voice Agent Bundle. Includes DTMF, directed voice, ASR and TTS functionality, scheduled call back, real-time and historical analytics, workflow and orchestration tools and an API layer.

- An administration portal that supports automated provisioning via API's.

- Suite of real-time and historical reporting and analytics services.

Agent Web Based Client capabilities

- **Navigation bar and Softphone** providing Agent controls.

- **My Stats:** Provides agent status and real-time information on skills.

- **Presence:** Widget to view other agents, teams, and their states to place calls to them.

- **Customer journey:** A powerful graphical, actionable widget that displays past customer interactions to the agent. Agent can click into these actions for transcripts, history, or past tasks.

- **Outbound services:** Widget for outbound call handling, available with Outbound Add On bundle.

- **CRM Integration:** Screen pops, caller look-up, click to dial, afterwork actions and follow up tasks.

- **Contacts:** Widget stores names and contact information in a global or personal list.

- **Auto search:** Automatically searches the analytics database and looks for interactions from the same contact.

- **Manual search:** The agent can perform manual search against the historical interactions.

IVR / IVA

Enhanced user experience by expanding the traditional voice driven platform to support new channels including two-way interactive self-service applications over SMS and email, visual IVR and digital channel integration with SMS or email messages interacting with workflows and automated applications.

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Application Services

- Support for web services, Media Resource Control Protocol (MRCP), VoiceXML (Voice Extensible Markup Language), CCXML (Call Control Extensible Markup Language) and other W3C (World Wide Web Consortium) standards.

- Low code integration tools allow fast service creation.

Media Processing Services

- Sets-up and terminates telephony sessions

- Interfaces to third-party speech and other multimedia service

- Pre-integration with Google CCAI and Dialogflow CX

- Supports control of multiple voice dialogs and sessions and advanced call control functions

- Open API workflow supports bring your own bot model

Call Back Services

- Gives customers a choice of receiving a call back based on estimated wait time (EWT) and queue position providing next agent available or scheduled call back options for callers.

- Callers have the ability to request callbacks through digital channels including from a web page, mobile applications or chat bot and messaging interfaces, using its web-services API.

Survey Services

- A survey assist multi-purpose application service that allows easy creation of automated voice, SMS, web and other digital channel surveys through the use of simple web interface.

- This is available for other uses beyond surveys, such as automated conversations for proactive notification (e.g., SMS appointment reminders and follow ups, order status, SMS payment reminders, transaction confirmations among others).

Administration and Provisioning

Interface for provisioning and executing Move/Add/Change/Delete (MACD). This service is the Security Assurance Markup Language (SAML) authority for authentication into administration and workflow applications.

Administrators have access to a task-oriented user interface (UI) to manage users and their communication resources with visibility into the communication resource inventory. A set of API are available for RPA into platforms (e.g. ServiceNow, Workday) to automate provisioning. The Provisioning Manager UI allows administrators to execute workflows to on-board, off-board and manage users and their related communication resources.

Reporting and Analytics

Avaya OneCloud CCaaS for Financial Services reporting and analytics[1] enables supervisors with visibility and end-to-end reporting with a consolidated view of the solution.

- Use real-time data to build customer journeys and identify trends.

- Integrated omnichannel reporting provides a complete view of customer interactions across channels.

- Use contextual data to create a more personalized customer experience at all touchpoints and data to predict next best actions of customers.

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[1] Aceyus Vue

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- Use personalized dashboards to gain the insights needed to respond in real-time.

- Use analytics to increase first call resolution, lower average handle time, and reduced escalations leading to higher NPS (Net Promoter Score) scores.

- Review historical data to analyze and understand where agents are struggling and make the necessary adjustments to optimize agent productivity.

IVR / IVA Reporting and Analytics

- Extensive set of call, session, and application record detail that can be presented within fully customizable web-based reports allowing a single view into all systems with operational indicators.

- Automatic 'breadcrumb' reporting of customer's experience at every step of an interaction including mapping data to view the geographical distribution of caller information for visual trends analysis.

Digital Services Add On Bundle

Overview

The Digital Services Add On Bundle to the Voice Agent Bundle enables advanced routing based on digital knowledge, Web chat, SMS, Async Chat, Email and corresponding analytics and administration in a single ACD.

Avaya OneCloud CCaaS for Financial Services supports multiplicity whereby agents handle multiple concurrent contacts, improving the customer experience and enhancing agent productivity.

Digital Service Add On Bundle to the Voice Agent Bundle is procured following the same measurement metrics, Concurrent Agent model using the high watermark of a measured period.

Web Chat

Presented in agents navigation bar and includes the following capabilities.

- **Proactive Chat:** multiplicity, timer settings, profanity filters

- **Routing:** Blended, last agent, domain based and subject and or key word routing

- **Supervisors Settings:** Auto answer and whisper

- **Agent Controls:** blending, transfer to queue or agent, three tier dispositions, spell check, grammar check, file attach, customer history and templates.

Improved customer knowledge and routing is provided by capturing and using what customers were doing prior to requesting a chat. Information such as the following can be passed:

- Browser used

- Type of device

- GPS coordinates, if available

- IP address

- Web page visitor elected to chat

- Any site authenticated (if applicable)

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SMS and Async Chat

Since SMS and social media chat is persistent, agents will automatically see details of prior interactions with the user on that number in the navigation bar. The end user has a persistent thread available on their mobile device which can be referenced at any time.

- **Persistence:** Message threads maintained across agents and presented

- **Proactive Chat:** Multiplicity, data masking rules, timer settings, profanity filters

- **Escalation:** Move digital interaction to voice

- **Routing:** Blended media, last agent

- **Supervisors Settings:** Auto answer and whisper

- **Agent Controls:** Blending, transfer to queue or agent, three tier dispositions, spell check, grammar check, file attach, customer history and templates.

Email

The Email channel appears on the agent's navigation bar. The agent receives the email information and any attachments as provided by the end user. If the email address of the sender is a recognized user, a green bar will illuminate next to the Search icon on the navigation bar. Capabilities include:

- **Email editor:** Shows email history in the agent's inbox, drafts, suspended emails, outbox and sent folders.

- **Transfer:** Agents can transfer email to another queue, another mailbox or agent.

- **Disposition:** Supports three tiers of disposition information in reporting.

- **Templates:** Created globally and made available at the queue level. Personal templates can be created. Multiple templates can be applied in a single email reply.

- **Email history:** Agents can see if an email is not the latest message in a conversation, the quantity of emails exchanged, and details of the associated messages.

- **Subject Matter Expert (SME):** Engagement with both internal and external resources is supported and follows a parent / child relationship within the routing and reporting components.

- **Queue management:** Supervisors see all email currently active in a mailbox and the status and contents of any particular email.

Outbound Services Add On Bundle

Overview

The Outbound Services Add On Bundle to the Voice Agent Bundle is an interactive outbound application that supports automated voice, SMS, and email notifications. These can be one-way or two-way notifications campaigns in an agent-less fashion.

This comprehensive proactive outreach solution enables organizations to create and manage all outbound communications making the customer experience valuable rather than as an intrusion and supports the following:

- Agent assisted preview, progressive, predictive dialing campaigns.

- Unified desktop and fully blended routing for a single agent experience.

- Automated voice, email, and SMS notifications and interactive services.

- Tight integration with IVR / IVA Services.

- Proactively reach customers with the right context at the right time.

Outbound Services Add On Bundle to the Voice Agent Bundle is procured following the same measurement metrics, Concurrent Agent model using the high watermark of a measured period.

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Authentication and Fraud Detection Services Add On Bundle

Overview

Avaya OneCloud CCaaS for Financial Services Authentication and Fraud Detection Services[2] provides authentication, secure payment processing, and PII (Personally Identifiable Information) collection services.

The approach is based on Trusted Identity Network platform which addresses identity verification, authentication, and customer data privacy throughout the customer journey, and across voice, digital and in-person interactions.

APIs are used to integrate existing applications and customer systems in addition to a set of pre-packaged applications such as customer authentication, continuous agent authentication and privacy preserving "clean screen" agent applications that can be rapidly deployed from the cloud.

The Authentication and Fraud Detection Services Add On Bundle to the Voice Agent Bundle is procured following the same measurement metrics, Concurrent Agent model using the high watermark of a measured period.

Avaya Conversational Intelligence Add On Bundle

Overview

Avaya Conversational Intelligence sends customer transcript, sentiment, and intent details with contextual content to agents and supervisors during live conversations to help agents create more efficient, accurate and meaningful customer engagements.

Capabilities include

- **Live services:** Transcription services, entity and intent identification and customer sentiment.

- **CRM integrations:** AI generated abstracts, transcriptions, and customer field bi-directional exchange and populations.

- **Knowledgebase integration:** Integrated for actions, workflow, action, and dictionary.

- **Workflows:** Rules based intent and workflow design.

- **Analytical tools:** Realtime Supervisor and Executive dashboards with integration to Avaya OneCloud CCaaS Analytics and Reporting.

- **Customer workflow triggers:** Event based execution of a workflow or insertion of an object into a workflow based on sentiment as well as keyworks and interaction triggered rules.

- **API access:** Unlimited API access to data including streaming.

Supervisor capabilities

- Supervisor can enhance compliance practices with internal policies and external regulations in real-time. The supervisor dashboard provides a screen with twenty-four agents real-time conversations shown as transcriptions.

- Sentiment and sales triggers draw the supervisor's attention to critical moments in calls. Supervisors can then act, coach, or join the calls.

- Avaya Conversational Intelligence can help organizations comply with internal and external rules and regulations using supervisor initiated or automated business rules.

The Avaya Conversational Intelligence Add On Bundle to the Voice Agent Bundle is procured following the same measurement metrics, Concurrent Agent model using the high watermark of a measured period.

[2] Journey.AI

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Workforce Engagement Bundle

Overview

Avaya OneCloud CCaaS for Financial Services Workforce Engagement Bundle[3] provides access to a suite of Workforce Engagement services.

The Workforce Engagement Bundle is procured based on quantity of licenses allocated and provisioned regardless of consumption or usage during the measured period.

The Workforce Engagement Bundle provides all licensed named agents with the following elements.

Compliance Recording

- Full time-time enterprise call recording, tagging, and archiving.

- Quickly search and extract actionable intelligence.

- Full text search of interaction voice recordings enabled by Advanced Speech Analytics.

- Transcription of 100% of interactions for Automated Quality and Advanced Speech Analytics.

- Export 100% of recordings in industry standard codec.

Screen Capture

- Visualize how agents use web chat, email, and other business applications to serve customers.

- Undetectable back-end process captures desktop activity and keystrokes.

- Screen Capture supports agents and knowledge workers.

Quality Management and Automated Quality Management

- Automate scoring of 100% of interactions for evaluation criteria that can be scored.

- Ensures script compliance and mandatory legal disclosures.

- Key Performance Indicator (KPIs) updates scorecards in minutes throughout the day.

- Evaluation forms can be 100% automated or partially automated.

- Shift resources from scoring script compliance to qualitative analysis reviewing recording, transcription, and screen capture of back-office processes.

[3] Verint

Performance Management

- Track and manage agent and team performance.

- Consolidates data from disparate systems into actionable KPIs.

- Create KPIs from external data sources.

- Advanced scorecards display employee performance.

- Intuitive drill down on best and worst calls.

- Automatically trigger coaching sessions when performance scores fall below set thresholds.

- Automatically trigger eLearning to deliver web-based lessons and training to agent desktops.

- Coaching Plans provide description of content, associated attachments, feedback loop, and follow-up session tracking.

Workforce Management

- Plan, forecast, and schedule employees to meet service level and cost objectives.

- Balance shift patterns and service level goals with employee skills, proficiencies and preferences.

- Monitor intra-day trends and adherence.

- Supports inbound, outbound, blended media, in-house, outsourced, and virtual operations.

- Develop long-term plans for capacity, staffing, hiring and vacation.

Speech Analytics

- Surface actionable intelligence from thousands, even millions of recorded calls.

- Automatically identifies, groups, and organizes words and phrases during spoken calls into trends.

- Pinpoint cost drivers, trends, and opportunities.

- Reveal non-compliance and fraud.

Desktop Process Analytics

- Provides visibility into employee desktop activities across applications and processes

- Set triggers in back-office applications to pause/resume recording for PCI compliance, provide Agent screen pop notifications, notify Supervisor

- Capture metadata from back-office applications to tag to interaction recordings for enhanced analytics

- Track agent application usage during call which can be displayed during recording playback.

- Advanced Desktop Analytics and screen capture can be deployed for back-office workers who do not take phone calls, for quality evaluation, process, and performance reporting.

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Automated Workforce Enablement Add On

Overview

The Automated Workforce Enablement Add On to Avaya Workforce Engagement Add On[4] provides advanced real-time automated agent efficiency services.

The Workforce Enablement Add On is procured based on the quantity of licenses allocated and provisioned regardless of consumption or usage during the measured period.

The Workforce Enablement Add On Bundle provides all licensed named agents with the following.

- Standard and custom handle time dispositions including After Call Work, talk time, hold time, agent state analysis.

- Training and communications management including performance-based assignments, dynamic training delivery, coaching, and recognition (anniversary alert or break, birthday alert or break, surprise break).

- Automated tasks including off-phone activity, scheduled and time-based tasks.

- Scheduled adherence including early break and lunch, late to break or lunch, prescheduled events.

- Staffing models provided including voluntary time off, voluntary overtime, intraday flex, all hand-on deck, overtime avoidance.

- Attendance status monitors unauthorized login, no call, and or no show.

- Monitor Aux state adherence.

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[4] Intradiem

About Avaya

Businesses are built by the experiences they provide, and every day millions of those experiences are delivered by Avaya Holdings Corp. (NYSE: AVYA). Avaya is shaping what's next for the future of work, with innovation and partnerships that deliver game-changing business benefits. Our cloud communications solutions and multi-cloud application ecosystem power personalized, intelligent, and effortless customer and employee experiences to help achieve strategic ambitions and desired outcomes. Together, we are committed to help grow your business by delivering Experiences that Matter. Learn more at www.avaya.com.

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