

# Customer Success Story

## Multinational Financial Services Group

In 2009, this Multinational Banking and Financial Services Group started working with Creative Virtual with the initial goals of improving their user experience and reducing calls to their contact center. The collaboration began with a single virtual agent on the website of one UK brand and grew into a long-term partnership. The success of the first V-Person™ implementations in achieving the initial goals proved their business value and laid the foundation for an expansion into other business divisions, countries, and languages over the next 10+ years.

2009

Launched virtual agent for first brand in the UK

The Banking and Financial Services Group was an early enterprise-level adopter of this technology. Even though virtual agents and chatbots were seen as relatively 'new' at the time, the group saw their potential for improving the website experience and cutting costs.

2010

Launched virtual agent for second brand in the UK

Four months after the launch of the online account support tool in 2011, the group found it had a **94% customer satisfaction rating** and was answering questions with a **96% success rate**. They also estimated deploying the virtual agent had already **saved them up to £2.4 million**. The success of this limited deployment led to the rollout of the tool site-wide for the UK Retail Bank.

2011-2012

Launched virtual agent for main Retail Bank brand in the UK designed specifically for online account support

The group continued to build on that initial success by deploying virtual agents across additional business divisions, including their Business and Corporate Banking. Today they have virtual agents available on public websites, within logged-in areas, and as part of their native app.

Expanded virtual agent site-wide due to success of the limited implementation

They have deployed virtual agents to support customers in **16 countries** around the world (including Argentina, Canada, China, Hong Kong, India, Indonesia, the United Kingdom, and the United States) and in **seven languages** (including English, French, Spanish, Simplified Chinese, and Traditional Chinese).

2013-2020

Launched new and expanded deployments for the group's Retail Bank, Business Banking, and Corporate Banking in multiple countries and languages

When the COVID-19 pandemic hit in 2020, they were well-prepared to handle the dramatic spike in customers' digital channel usage. During the 3-4-month period of the initial widespread shutdowns and stay-at-home orders, the **virtual agent traffic nearly tripled**. Even after those large peaks, usage continued to be greater than usual with **high customer satisfaction scores**.

Added seamless handover to Live Chat

Added virtual agent to a native Banking App

They discovered that their virtual agents were the best way to keep up with rapid changes and deliver accurate information to customers. The process to update content within the virtual agent was quicker and easier than updating content on the website, allowing them to make as many changes as needed while minimizing the amount of time their teams spent actioning those changes.

2021

Reached 21 deployments implemented in 16 countries and 7 languages, answering over 14 million questions per year

Additional deployments, languages, and integrations planned

### Creating Brand Consistency with Custom Solutions

Deploying V-Person virtual agents across multiple business divisions and in countries around the world has enabled this International Financial Services Group to create consistency in how they deliver customer support.

At the same time, the unlimited options for customization and integrations has enabled them to create this consistency while also tailoring each deployment for the local language, culture, and business practices. For example, in some countries they use an avatar to drive usage while in others they use a messenger style interface. In multi-lingual countries, the virtual agents are often built to allow users to seamlessly switch between languages.



### The Power of V-Portal™ & Conversational AI

The ongoing evolution of Creative Virtual's V-Person technology and V-Portal, the virtual agent management platform, has enabled this global rollout and long-term success. The group benefits from its virtual agents being able to self-learn while keeping complete control over the applied learnings and system responses. The workflow functionality and user permission settings in V-Portal also support them in ensuring proper sign-off of content and meeting compliance requirements.



**Why Creative Virtual?** As a pioneer in the chatbot and virtual agent space, Creative Virtual has played an important role in the advancement of this technology and the ways in which it can be implemented for nearly two decades. Our experienced team closely monitors trends and the evolution of customer and employee engagement in order to provide organizations with cutting-edge conversational AI solutions. Today we are an expert in the industry, ranked as a Leader in Conversational AI by ISG, named the Product Leader in AI-Enhanced Customer Self-Service by Frost & Sullivan, and winning The Queen's Awards for Enterprise: Innovation.

Learn more: [www.creativevirtual.com/us](http://www.creativevirtual.com/us)  
[infousa@creativevirtual.com](mailto:infousa@creativevirtual.com)

**creativevirtual**  
The science of conversation™