

Customer Success Story:

Top US Bank Deploys V-Person™ Personalized Virtual Assistant

The Challenge

One of the largest banks in the United States made the strategic decision to use a virtual agent for the loans, banking, and credit cards sections of their website. Their goal was to create a great customer experience on authenticated pages. They began their search for a virtual agent solution to meet specific criteria, such as:

- Natural Language Processing (NLP) to ensure that the virtual agent was able to interpret complex questions asked by users
- Ability to operate in Spanish
- Integration with back-end systems that contained customer profile data in order to create a personalized experience
- A system the bank could manage and maintain a workflow to support a complex content approval flow
- A solution that could be run in web, mobile and tablet environments using responsive design
- Technology the bank could host, in order to meet the stringent security regulations of their industry
- A solution that was scalable enough to work in one of the world's largest banks
- Operability on a WebSphere, Linux, SQL Server stack across multiple servers and locations
- ROI within a year

The Solution

This top bank selected Creative Virtual's V-Person technology as the best fit for their organization and virtual assistant requirements.

Creative Virtual's knowledge management system, V-Portal™, was a major differentiator in this decision. The ability of the knowledge management system to generate personalized answers to logged-in users based on their account information and profile was something competitors' solutions lacked.

The building blocks of content for the system were created from Creative Virtual's V-Person for Financial Services template and collaboration with the client's web and call center teams.

The virtual agent (VA) helps customers within the logged-in area from the "search bar," which is visible on every page and the conversation takes place in an iframe within the window, not a *pop-up*.

Personalization allows for unique, relevant answers, based on the services and products that the customer uses. This level of personalization based on customer profiles is unique to V-Person and has empowered this bank to create a relevant, powerful, personalized experience for every user.

V-Portal's reporting suite also gave this bank the ability to rapidly react to real-time conditions, by providing it with unfiltered, voice-of-the-customer reporting. V-Portal also gives this bank the tools necessary to enable the rapid deployment of consistent, correct and compliant answers. This element of the solution made the bank quick and agile in its responses to the threats posed by the Target security breach and the Heartbleed security bug. New, relevant and compliant content to address these concerns was pushed out to customers within days of these questions being flagged by the reporting system.

The successful deployment of Creative Virtual's holistic solution for smart help in a large global enterprise demonstrates the scalability of V-Person underscored by the millions of conversations per month now being handled by this virtual assistant.

The Result

Since their V-Person went live, this financial services company has seen customer satisfaction from the VA consistently rise.

Leveraging Creative Virtual's proven approach, the content is continuously reviewed, refined and supplemented, based on customer feedback.

V-Person's reporting has enabled this bank to gain better insight into their customers and the questions they are asking, which has led to an overall improvement in the entire customer experience.