

## High quality customer interaction through all media creates a growing number of satisfied banking, credit card, and other financial services customers.

It's no surprise that the majority of financial institutions' customers say service is the most important determinant of their satisfaction. Quickly identifying your most profitable customers, as well as striving to provide the highest quality service to all customers, creates a strong, growing and loyal customer base.

The ability to record specific, essential call center interactions is critical in financial services. New products must be released on a regular basis under tight time constraints to stay competitive. In order to keep up with the high volumes of customer interactions and improve customer service representative (CSR) training and customer service, leading institutions are expanding their customer interaction monitoring capabilities into business-driven recording (BDR) with the eQuality™ suite of software applications from Witness Systems.

eQuality lets you record agent screen activity synchronized with the voice conversation between the agent and the customer based uniquely on business rules you define. You can proactively record and analyze customer interactions regardless of whether the customer interaction is through e-mail, Web chat, or the telephone. You define rules based on what drives particular aspects of your business. Target specific product transactions, campaigns, or customers. BDR lets you know if your best customers are being treated to the highest quality of service. You can use business rules to initiate as well as search recordings.

**With eQuality you get a complete view of contact center performance, including clear targets for improving service quality, goals for creating training plans, and analysis of which enterprise processes are working and which can be improved.**



**Multimedia recordings can be evaluated using eQuality Analysis, which measures contact center performance. This eliminates manual data collection and facilitates the accurate assessment of performance against expectations for metrics, such as trouble ticket response time and average Web chat time, as in this example.**

eQuality Evaluation™ gives you the ability to perform scoring online. You can evaluate a CSR's performance efficiently while eliminating "pencil and paper" scoring. With eQuality Analysis™, evaluation scores are combined with other performance metrics such as adherence to schedule, average handle time, and number of e-mails completed, for example.

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**Effective tools for managing the shift from telephone interaction to electronic delivery of sales and service allows you to manage the quality of increasing e-mail, Web chat and guided browser sessions**

By the year 2001 nearly 20 percent of retail financial service transactions will be Internet-based. Your customers expect, and you strive to provide, consistent handling of their inquiries, regardless of how they contact you.



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# eQuality for financial services

eQuality Response™ gives you the ability to monitor the quality of your e-mail responses and the efficiency of the CSRs creating those responses. As part of the eQuality suite of products, eQuality Response can help you automatically record and/or analyze responses based on the business rules that drive your financial institution, rules that you define. You can evaluate your service and sales performance through e-mail the same way eQuality helps improve service quality with voice/data recordings.

For recording and evaluating collaborative Web chat sessions with your customers, Witness Systems delivers eQuality Interactive™, which applies business rules to trigger the recording of collaborative chat sessions. In collaborative chat situations, you'll have the advantage of capturing not only instant messages, but also CSR's pushing Web pages, documents and scripts. You can evaluate not only the quality of those interactions, but how effectively and efficiently your CSRs are using the chat tool.

CSRs who handle telephone calls well may not initially have the skills to respond to e-mail or conduct collaborative chat interactions effectively. Now you can help ensure that you're coaching for consistent performance on e-mail and chat contacts, just as you do today for traditional phone calls. You can ensure that only the most qualified CSRs are handling the most appropriate interactions live and in e-mail.

As integral parts of eQuality Business-Driven Recording, these tools combine for effective management of customer transactions, regardless of interaction medium, and for the evaluation and analysis of those interactions. You can help optimize not only the effectiveness of your telephone interactions but of your Web technology deployments through training and on-going quality improvement with an overall picture of call center performance based on what drives your financial institution.

#### **eQuality for financial services helps you:**

- Record and evaluate telephone, e-mail and Web chat transactions
- Record and evaluate specific financial transactions
- Monitor large volumes of multi-media interactions without slowing down the network
- Combine qualitative and quantitative statistics for a clear view of overall call center performance
- Choose your level of security, such as who can replay and evaluate interactions
- Optimize your Web technology deployments

From sophisticated telephone interactions through e-mail and instant message evaluation and analysis, Witness Systems delivers the complete suite of quality improvement tools you need. You can monitor high volume customer service, optimize to maximize revenue and customer satisfaction, control costs, and enhance service delivery as well as enterprise processes based on rules you define.

eQuality supports the Microsoft® Windows NT™ operating system for increased reliability, simplified management, and the highest level of security available.

You can turn to Witness Systems for "eQuality" answers as the trend toward centralized financial hubs and direct channel customer contact continues to increase.

**Find out how eQuality can benefit your organization by calling 1-888-3-WITNESS.**



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Bringing eQuality to eBusiness™