



BDO Unibank - Case Study

Delivering delightful customer experience
with a truly global service desk

Filipino banking sector is recording double digit growth with the increased penetration of branchless banking. As the largest bank in Philippines, Banco de Oro, or BDO Unibank, as is popularly known, it was natural to be a front runner in full service universal banking. The bank provides products and services to the retail and corporate markets including lending (corporate, middle market, SME, and consumer), deposit-taking, foreign exchange, brokering, trust and investments, credit cards, corporate cash management and remittances. BDO Unibank also offers Leasing and Financing, Investment Banking, Private Banking, Bancassurance, Insurance Brokerage and Stock Brokerage services. It chose CRMNEXT to implement a true global service desk wherein any executive can service any customer without the barrier of time, cost or location.

ASPIRATIONS

BDO Unibank wanted to evolve from manual intensive processes to fully digitalized servicing platform. It had a massive challenge of handling 1,400+ different types of service request with over 5,000+ solutions managed through multiple disparate systems and spreadsheets. It wanted to create a unified service strategy execution platform. It also wanted to break down siloes between different departments to quicken turnaround times and shorten call handling times. There was high dependency on agent expertise and manual intervention that was an impediment on case resolutions and knowledge transfer. They wanted strong authentication process dependin on multiple dynamic parameters depending on customer segment and sensitivity of service request to guard against fraud possibilities.

HIGHLIGHTS



1,200+ Users



1,100+ Branches



7 Countries (HQ - Philippines)



10 Integration applications



1,400+ Service categories and sub categories



5,000+ Solutions

Transforming customer service with a global service desk

BDO has thus transformed itself by redefining banking servicing standards with AAA (anytime, anywhere and any device) class global service delivery.



High first contact resolution

BDO Unibank's customers can now have their issues accurately and quickly addressed at the first connect itself. thus increasing delight. Service teams can deliver to deliver single touch resolutions with the help of Screenflow(TM) designer. This results in increased customer delight and advocacy.



Delightful service journeys

Rich visual designers that construct intuitive, automated and guided service journeys ensures that BDO's customer engagement is always standardized and automated with personalized templates across channels.



Elimination of multi system hopping

CRMNEXT's dynamic validation models with real-time integration fetches data from external systems An executive can solve any type of problem without hopping between multiple systems and passing to another department with the help of real time integrations with Autonomia Integrations (TM).



Dynamic solution workbench

Global service desk where any agent can service any type of request. System automatically presents solutions from a knowledge bank depending on 1400+ categories and subcategories with 5,000+ solutions to aid in quick resolution. Solution bank is automatically updated and available for future reference creating a self-learning system which helped to significantly reduce service costs.



Proactive fraud protection

Dynamic Data Leak Protection (DDLDP) widget automates complex validation models Subjective DLP (Data Leak Protection) with external support, section wise authentication and group wise scoring. This actively helps to prevent frauds and transfers suspicious cases to respective fraud prevention departments.

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