

The big 3: what to consider when selecting a communications automation provider

A checklist for financial institutions

As consumer demands increase and the economy evolves, financial institutions must be able to adapt and scale their contact center and customer communications quickly and easily.

That's where communications automation comes in. The solution delivers a great customer experience (CX) to your customers, while streamlining agent resources, time, and cost. Delivered via workflows found in a communications automation platform (CAP), communications automation delivers omnichannel, artificial intelligence (AI), and self-service solutions that layer over the top (OTT) of your existing contact center platform – without ripping and replacing.

Selecting the right communications automation provider is critical to your success. Review the following elements with your current or future automation provider to ensure they can meet your financial institution's unique needs.

1. Omnichannel, AI, and self-service <i>Omnichannel, AI, and self-service are the cornerstone of communications automation.</i> For your financial institution to truly automate CX, your solution should include:	Other provider	IntelePeer.
Truly omnichannel, interconnected applications		<input checked="" type="checkbox"/>
AI supported by natural language processing (NLP)		<input checked="" type="checkbox"/>
Cloud-based routing to get callers to the right agent at the right time		<input checked="" type="checkbox"/>
Customer self-service capabilities like bill pay, transfers, direct deposit		<input checked="" type="checkbox"/>
Contextual notifications to alert customers about inquiries, status, and more		<input checked="" type="checkbox"/>
Comprehensive, advanced analytics		<input checked="" type="checkbox"/>

2. Security and reliability <i>Staying compliant with security regulations and meeting reliability criteria is imperative.</i> To deliver consistent and reliable communications and protect customer data against unwarranted access, your automation provider should:	Other provider	IntelePeer.
Maintain a secure production network, subjected to regular vulnerability testing		<input checked="" type="checkbox"/>
Adhere to disciplined network access procedures, limited to authorized personnel		<input checked="" type="checkbox"/>
Conduct highly disciplined, monitored upgrades to the network and network systems		<input checked="" type="checkbox"/>
Direct private circuits into and out of their network		<input checked="" type="checkbox"/>
Encrypt signaling, voice, and media (TLS/SRTP)		<input checked="" type="checkbox"/>
Provide SMS APIs that power two-factor authentication and instant fraud alerts		<input checked="" type="checkbox"/>
Never collect/store DTMF digits or audio recordings		<input checked="" type="checkbox"/>
Maintain Service Provider Level 1 PCI compliance		<input checked="" type="checkbox"/>
Hold SOC2 Type II certification		<input checked="" type="checkbox"/>
Deliver cloud queuing to manage high-call volumes		<input checked="" type="checkbox"/>
Guarantee 99.999% uptime		<input checked="" type="checkbox"/>
Deliver 3X redundancy		<input checked="" type="checkbox"/>

3. Differentiators <i>Automation shouldn't be complicated.</i> For you to seamlessly improve your customer communications and operations, your automation should have the capabilities to deliver:	Other provider	IntelePeer.
Low-code/no-code, pre-built workflow template applications, requiring zero or minimal coding to deploy		<input checked="" type="checkbox"/>
Caller ID reputation management that integrates number registration, monitoring, and remediation		<input checked="" type="checkbox"/>
Inbound spam filtering that assesses the validity of calls and excludes spam before the call makes it to agents		<input checked="" type="checkbox"/>
The ability to layer OTT of multiple instances, connecting data from disparate contact center platforms		<input checked="" type="checkbox"/>
24/7/365 professional support from the engineers who built the solution		<input checked="" type="checkbox"/>

Are you ready to boost CX, surpass consumer expectations, and modernize your financial institutions' contact center without ripping and replacing existing infrastructure? Contact IntelePeer to get started now.

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Do you want to learn more about accelerating your customer engagement with generative AI and automation? Schedule an AI and automation Customer Interaction Intent Study with IntelePeer now.
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