1. Omnichannel, AI, and self-service

Omnichannel, AI, and self-service are the cornerstone of communications automation. For your financial institution to truly automate CX, your solution should include:

- Truly omnichannel, interconnected applications
- AI supported by natural language processing (NLP)
- Cloud-based routing to get callers to the right agent at the right time
- Customer self-service capabilities like bill pay, transfers, direct deposit
- Contextual notifications to alert customers about inquiries, status, and more
- Comprehensive, advanced analytics

2. Security and reliability

Staying compliant with security regulations and meeting reliability criteria is imperative. To deliver consistent and reliable communications and protect customer data against unwarranted access, your automation provider should:

- Maintain a secure production network, subjected to regular vulnerability testing
- Adhere to disciplined network access procedures, limited to authorized personnel
- Conduct highly disciplined, monitored upgrades to the network and network systems
- Direct private circuits into and out of their network
- Encrypt signaling, voice, and media (TLS/SRTP)
- Provide SMS APIs that power two-factor authentication and instant fraud alerts
- Never collect/store DTMF digits or audio recordings
- Maintain Service Provider Level 1 PCI compliance
- Hold SOC2 Type II certification
- Deliver cloud queuing to manage high-call volumes
- Guarantee 99.999% uptime
- Deliver 3X redundancy

3. Differentiators

Automation shouldn’t be complicated. For you to seamlessly improve your customer communications and operations, your automation should have the capabilities to deliver:

- Low-code/no-code, pre-built workflow template applications, requiring zero or minimal coding to deploy
- Caller ID reputation management that integrates number registration, monitoring, and remediation
- Inbound spam filtering that assesses the validity of calls and excludes spam before the call makes it to agents
- The ability to layer OTT of multiple instances, connecting data from disparate contact center platforms
- 24/7/365 professional support from the engineers who built the solution