



CASE STUDY

ActivTrak Drives Contact Center Efficiency for Financial Services Leader

A leading financial services company replaced Verint Desktop and Process Analytics with ActivTrak to improve the contact center's workforce productivity. The company was able to track productivity, identify areas of improvement and make better decisions about resource allocation. As a result, the company improved workforce efficiency and reduced costs in its hybrid contact centers.

Background

The client is a leading global financial services company that offers a wide range of financial products and services, including retirement plans, life insurance, investments and annuities. Based in the US, it has over 20,000 employees across the globe and \$1.5 trillion under management.

The Challenge

This financial services company, like many other companies that manage contact centers, has a large global hybrid workforce. In this new era of hybrid work, they found it challenging to ensure compliance and productivity without supervisors in the remote contact center environment. Relying on outdated workforce solutions, the company was unable to effectively ensure that the 1,200 hybrid and remote agents in their insurance division were productive during their scheduled work hours without sacrificing customer satisfaction (CSAT).

The company deployed a suite of solutions from Verint which included the Desktop and Process Analytics solution to record agent hours worked. To get insights from the data, it had to be manually downloaded, formatted and visualized weekly for the management team by data analysts, which required extra time and resources.



"We had been using Verint DPA for a couple of years. While the data was a good starting point, we regularly encountered a number of data quality issues and had to do a lot of manual work to make it presentable to the end user. Without this work, it wouldn't be valuable to our end users."

Senior business analyst

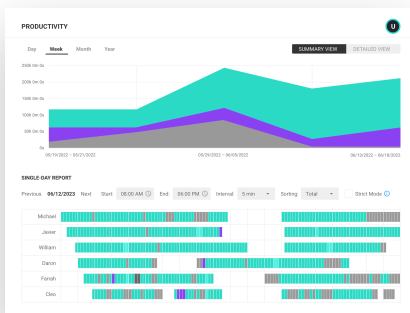
The Opportunity

The director of process improvement looked to replace Verint's Desktop and Process Analytics with a more automated solution to allow them to go beyond measuring employee work hours and get actionable business-level insights to help drive results. Specifically, they wanted a solution to help them:

- Improve agent efficiency to deliver high-quality service to more customers without hiring more agents
- Identify opportunities to increase agent utilization rates between divisions, geographic locations and work environments (hybrid, remote, office)
- Identify agents at risk of burnout
- Have simple, easy-to-understand activity data integrated into their weekly dashboards to support team management and performance improvements

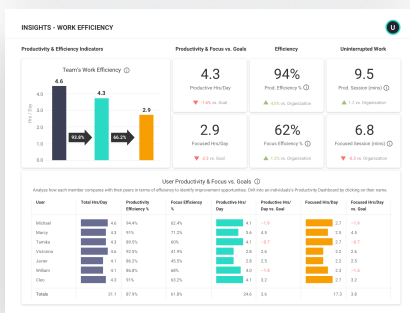
Solution Implementation

The client deployed ActivTrak across the insurance division's 1,200-agent contact center. ActivTrak collects digital activity data from the agents' computers, then displays the data in out-of-the-box, customizable dashboards. With the help of ActivTrak's professional services team, the client also developed a custom dashboard combining ActivTrak data with their customer service management application data delivered through their standard Power BI tool.



ActivTrak data collection includes:

- Exact times of agent activity
- Daily start time, breaks and end time
- Time spent on tasks
- Application and website usage



Out-of-the-box dashboards and reports leveraged:

- Working hours and schedule adherence
- Team and agent productivity and focus goal tracking
- Work efficiency insights and opportunities
- Agent capacity/utilization



The custom dashboard they created gave them:

- A "single pane of glass" view correlating customer case resolution KPIs with activity KPIs
- Custom reports embedded in the company's standard Power BI portal

Results

Thanks to ActivTrak, this financial services company can now effectively ensure that its 1,200 remote contact center agents work productively to deliver high-quality customer service. Additionally, they increased agent utilization and capacity allowing them to serve more customers with the same headcount. Due to these successful outcomes, they have expanded their use of ActivTrak to the retirement division.

By using ActivTrak, the director of process improvement was able to accurately measure all activities on the agent's console to understand how work happens and identify improvement opportunities. This solution provides reliable and comprehensive productivity information used in their daily and weekly hybrid team management interactions.

Business Outcomes

- Agent productivity:**
 Increased productivity by 1,200 hours per week (12 minutes a day per agent)
- Shift adherence:**
 Improved schedule adherence by 12% driving lower call abandonment rates
- Agent capacity:**
 Increased utilization by 3% which resulted in \$1.6M in savings from reduced hiring
- Effective hybrid team management:**
 Made management and coaching of hybrid teams better through proactive work visibility and insights into intervention opportunities

"We sought to validate hours worked and ended up getting additional visibility into the quality of time worked. We can now effectively measure productivity, focus and collaboration. Furthermore, we can incorporate these metrics into our business dashboards to understand the activities that drive results. ActivTrak is now a critical part of our hybrid team management and has a significant role in driving our contact center efficiency and performance improvement."

AVP of Insurance division



About ActivTrak

ActivTrak is a workforce analytics platform used by a wide variety of organizations, including financial services companies, healthcare organizations and government agencies to gain visibility into employee work activity.

[Request a demo](#)

