

GENESYS™

Apoio:

apcc
associação
portuguesa de
contact centers

BAN[CX]ING

Redesenhar o futuro da experiência
do cliente no setor bancário.

4 DE NOVEMBRO 2021



ORADORES



Pedro Miranda
Presidente, APCC.
Diretor Geral,
SIBS Processos



Ana Gonçalves
Secretária Geral,
APCC



Luis Miguel
Domínguez
Country Manager
Genesys Iberia



Márcia Machado
Senior Sales
Executive, Genesys
Portugal



Susana Cipriano
Figueiredo
Head of Contact
Center, Millennium
BCP



Lídia Oliveira Sá
Directora da
Direcção de
Banca Directa,
Caixa Central de
Crédito Agrícola
Mútuo



Hugo Preto
Diretor Executivo
(Resp. Por
Customer Service),
Santander Portugal



PROGRAMA

09:30h - Apresentação.



09:40h - Make CX Count.



09:55h - A próxima conversa: Transformação digital da Experiência dos clientes.



10:10h - Mesa Redonda: Mastering Digital Transformation After Pandemic.



10:45h - Perguntas e Respostas.

11:00h - Conclusão.



MAKE CX COUNT



Luis Miguel Domínguez
Country Manager Spain & Portugal

!! CX SEEMS SIMPLE

- Customers contact your business
- Self serve or route to agents when needed
- Agents use tools and resources to help
- Supervisors manage the workforce
- Business offer new services when required
 - Digital Capabilities
 - Virtual first
 - Remote workforce

HOW CHALLENGING CAN IT BE?



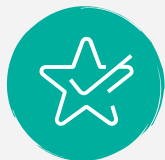
Understanding why CX is challenging today

CUSTOMER NEEDS AND TRENDS CHANGE



- Explosion of digital growth in addition to regular touchpoints
 - 40% more digital service in 2021
 - 85% of service interactions virtual by 2022
- Customers have continuously moving expectations & options
- You are being compared to the best CX services across verticals

REQUIRING VENDORS TO CHANGE



- Need new features or capabilities from your vendors to change
- Stuck asking "when can I have" vs "how should I use it"
- You can only take advantage of what your vendor makes available to you

REQUIRING AN I.T. CHANGE PROCESS



- Need a faster way to implement new capabilities
- With premise maintenance and delivery cycles it feels just impossible to keep up as your contact center grows

TO HAVE CROSS FUNCTIONAL LIMITATIONS



- Product built in silos requires complex integrations for you and technical debt
- All in 1 is different than native all in 1

Peeling back the onion of effective CX

SOLUTION IDENTITY MAP

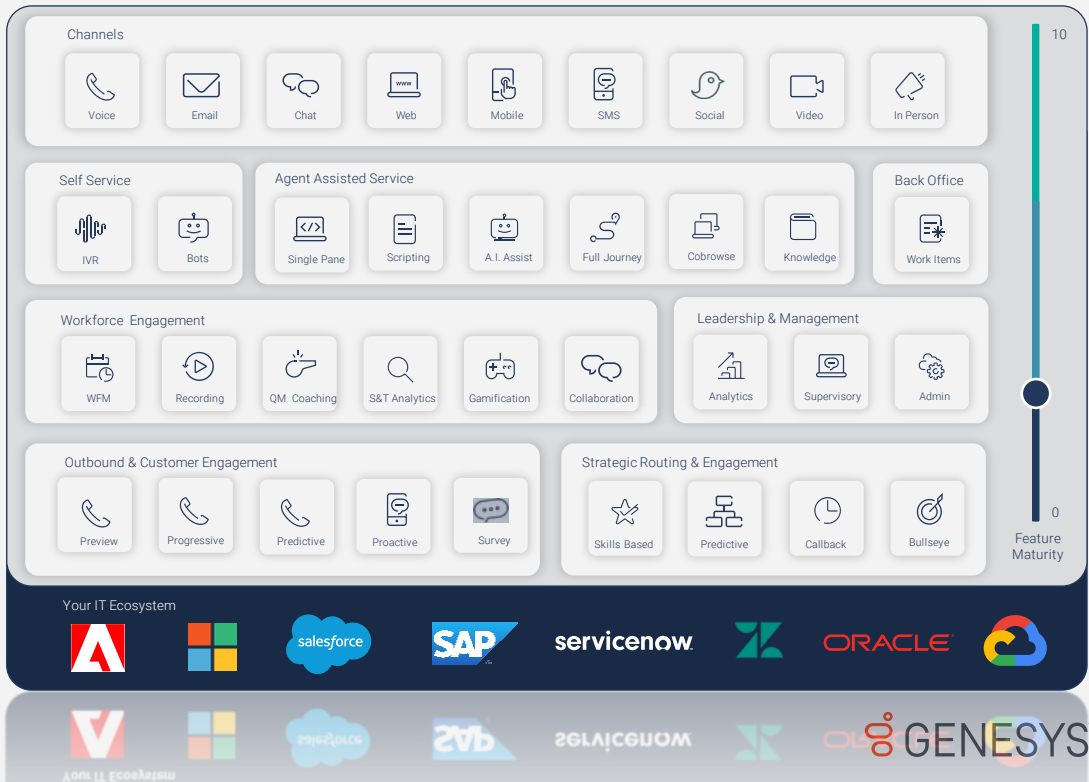
* **EFFECTIVE CX IS MORE COMPLEX THAN IT SEEMS**

* **AS YOU TRY AND CHANGE, THINGS GET EXPONENTIALLY MORE DIFFICULT**

- Implementation Challenges
- Technical debt with custom code to fix limited or silo product
- Version dependencies
- Quarterly, annual windows to innovate
- Break/fix processes
- Duplicated administration efforts per silo

* **EACH CHANNEL MULTIPLIES THIS PROCESS.**

* **PREMISE IS NOT $1+1 = 2$.**





**HUNDREDS OF GENESYS CONSULTING ENGAGEMENTS HAVE RESULTED
IN SIMILAR OUTCOMES**

Current CX Innovation Maturity

* RISK

- “We are a “Belt and suspenders” type of company”
- Over Engineering

* EFFICIENCY

- “We don’t leverage our tools well “
- Hard to stay current
- Slow drips eventually build up

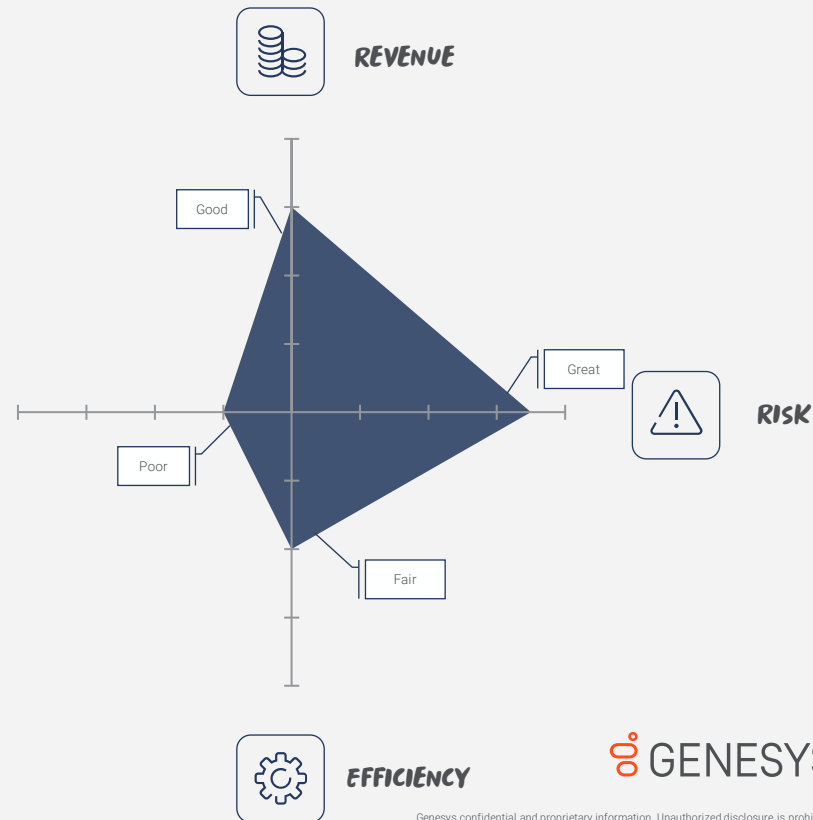
* TIME TO MARKET

- “IT is the most precious resource”
- Hard to reserve for continuous innovation

* REVENUE

- Member growth is the core metric
- Must be great at CX or competitors win share from churn

TIME TO
MARKET



Priorities of Where to Improve CX Maturity

* EFFICIENCY

- Improving efficiency drives revenue
- Key to keeping costs low
- Reducing dependence on hiring new agents

* REVENUE

- improving revenue per member (cross-sell) while still driving new customers

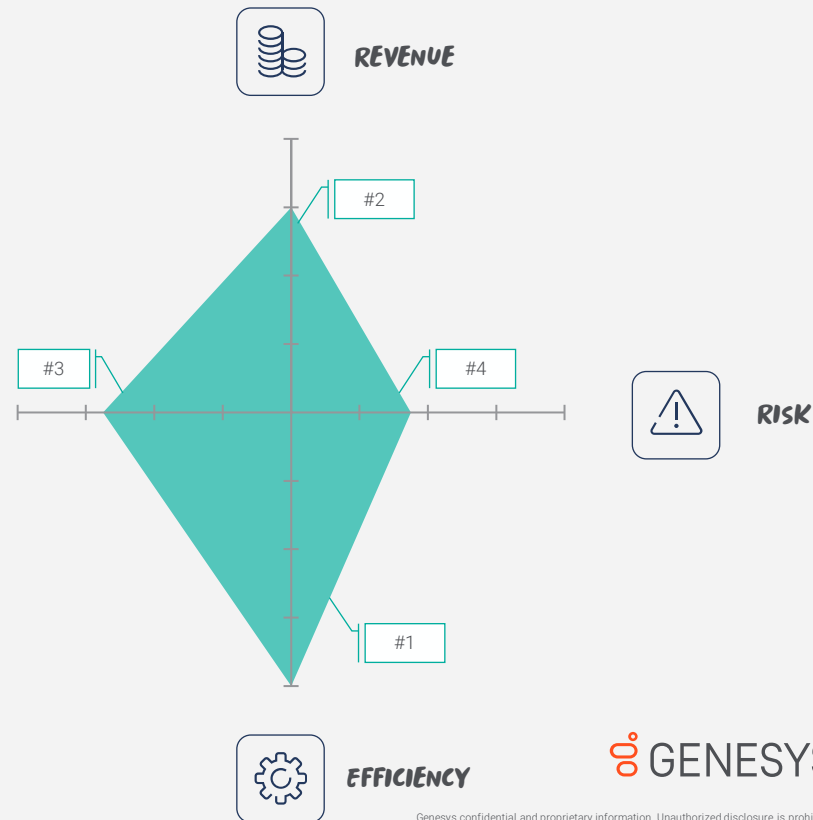
* TIME TO MARKET

- Change & Refresh
- Competition
- Millennials
- Digital First Boom

* RISK

- A must have –but not a business differentiator. It's standard and shouldn't impact the other drivers

TIME TO
MARKET



Comparing The Two – What do you think?

CURRENT STATE VS. PRIORITY TO IMPROVE

- * How does this compare to where you see your organization?
- * How would you define your ability to meet demand, innovate and drive efficiencies?

**TIME TO
MARKET**



REVENUE

- * What may be keeping you from meeting your goals?
- * How challenging is it to innovate?



RISK



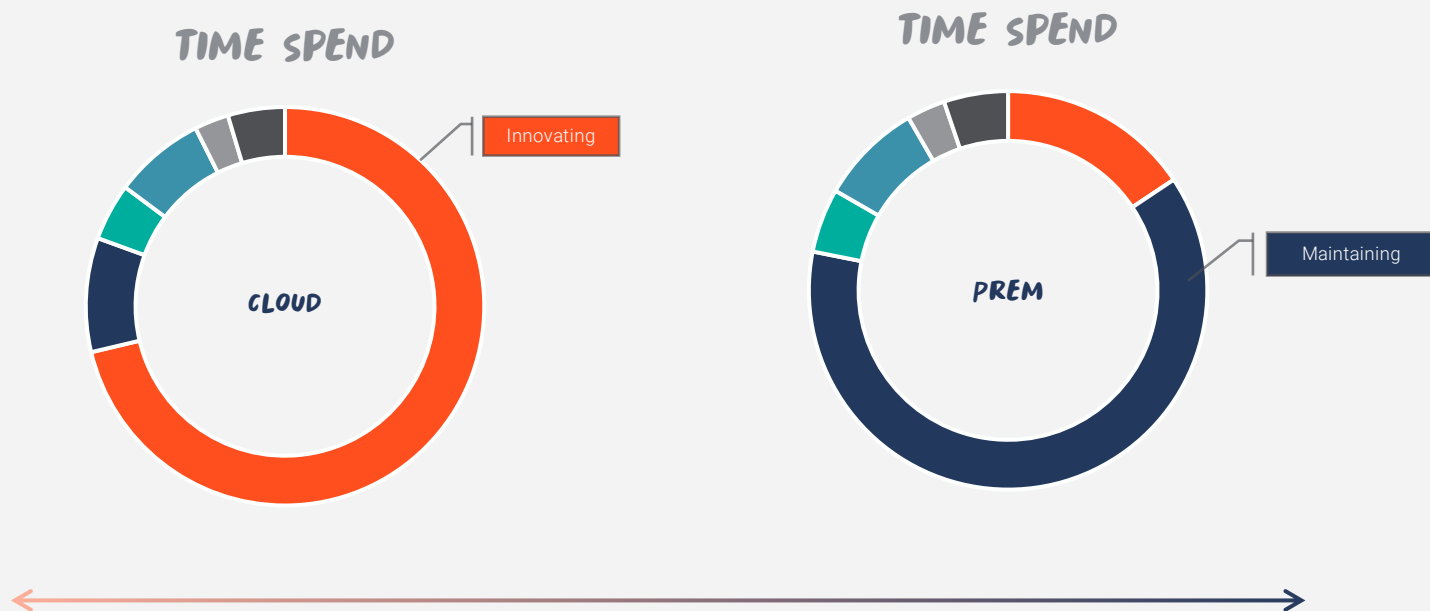
EFFICIENCY

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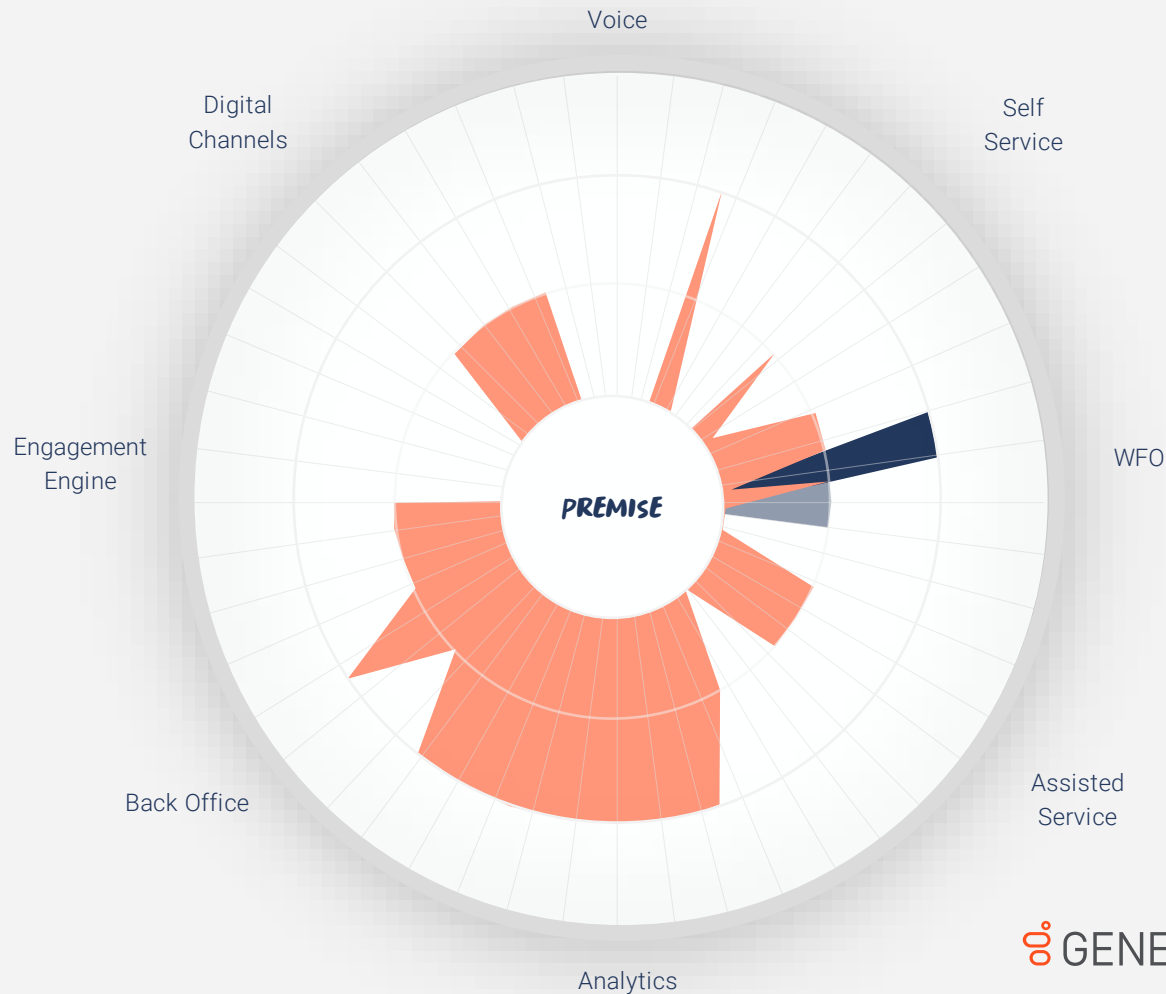
Transforming the way of providing CX

SAME RESOURCES, DIFFERENT OUTCOMES



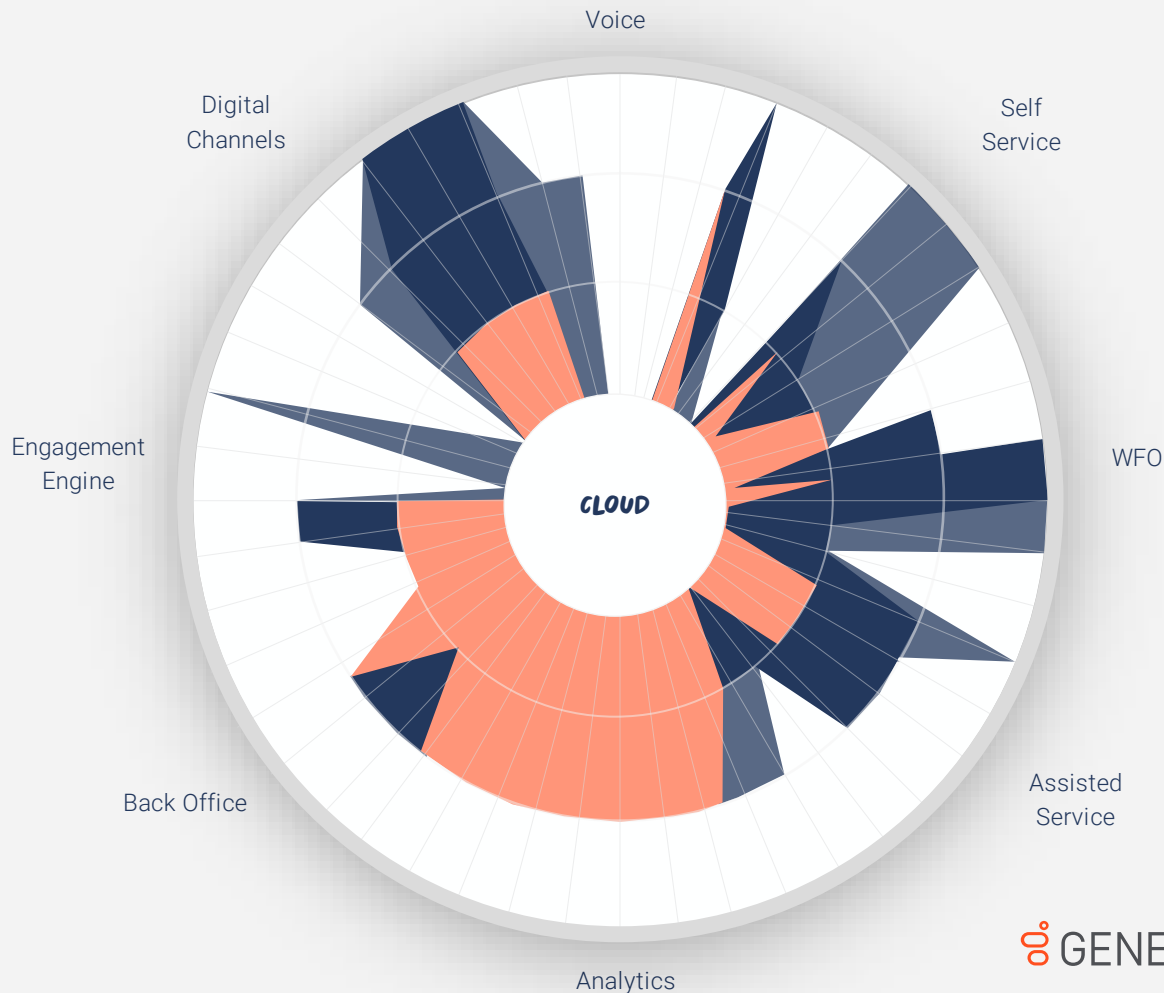
CURRENT MATURITY EXAMPLE

- Orange areas are current capabilities
- White spaces are opportunities to improve
- Blue is implementation run rate of phased roll outs effecting time to market

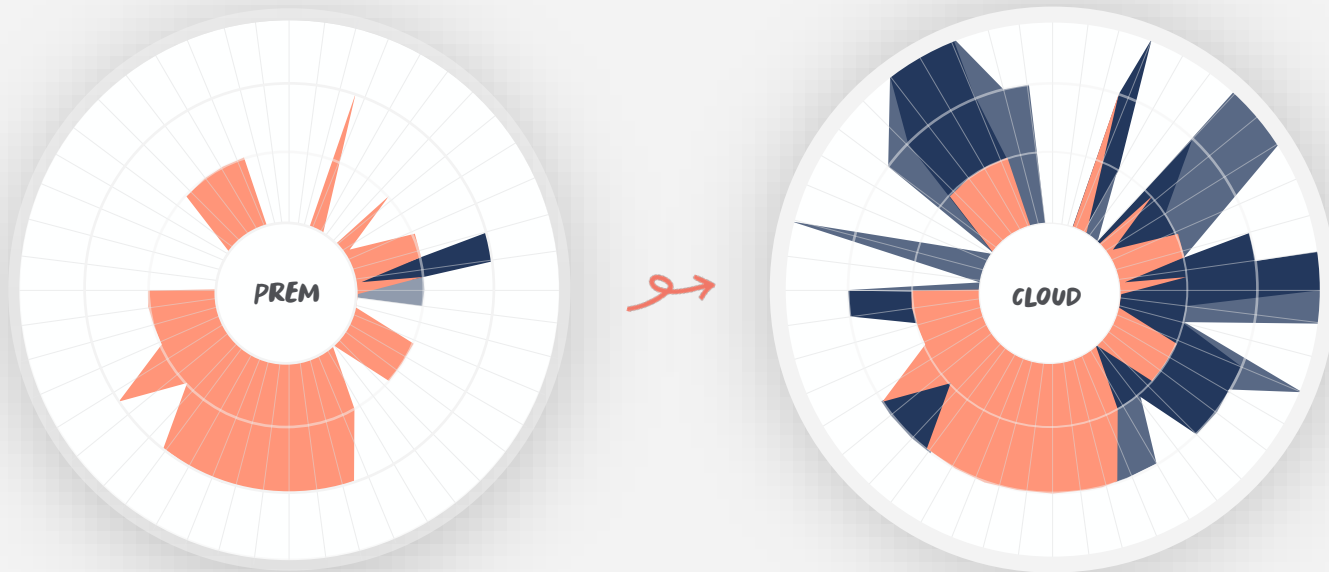


OPTIMAL MATURITY

- The goal is to not be great at everything – only the areas that matter to your business
 - Teams have access to use the capabilities they really need
- **Cloud Eliminates common Premise challenges**
 - Implementation Challenges
 - Technical debt with custom code to fix limited product
 - Version dependencies
 - Quarterly, annual windows to innovate
 - Break/fix processes
 - Duplicated administration efforts per silo



Paradigm shift from “when can I have” to “how should I use”





**GENESYS IS TRANSFORMING OUR WAY TO OFFERING CX
TECHNOLOGY TO SOLVE FOR THIS**

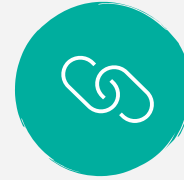
The new CX connects agile Business demands with IT operational efficiencies



**Faster Access to
innovation for customers**



**Continuous Automated
Delivery Cycles**



**Stronger alignment
between Business & IT**



**Evergreen
Always up to date**



**Simplified
Infrastructure & Choice
of Cloud Deployment**



**Accessible API's and
low code integrations**



**Optimized for Scale
and Remote Workforce**



**Native All in 1 with
vendor consolidation**

CX Success requires trust with a track record of delivering

Each of the 4 components are critical to a successful Cloud CX Partner.



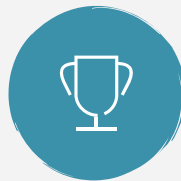
ALL IN 1 STRATEGY

- Native Leadership
- Voice, Digital, WFO, API, A.I.



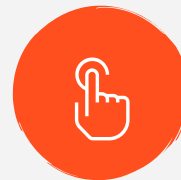
R&D INVESTMENT

- Built for Cloud
- \$250 Million annually
- Only CX Focused



PROVEN PRODUCT TEAM

- +300% Agent Growth YoY
- +267 Features last year
- 99.997 > 99.998 YoY
- 2700+ Customers
- Industry Leadership
[Gartner](#), [Forrester](#), [Omdia](#),
[Frost & Sullivan](#)



CONTINUOUS DELIVERY

- Requires no customer effort or interruption
- Intraday automation
- 20,000 code updates annually
- New features weekly
- Always up to date
- Click to try new things



OBRIGADO



Cloud Transformation **FOR FASTER TIME TO VALUE**



Genesys Cloud

CLOUD ARCHITECTURE



DESIGNED FOR THE CLOUD

400 Microservices,
built on AWS, DevOps

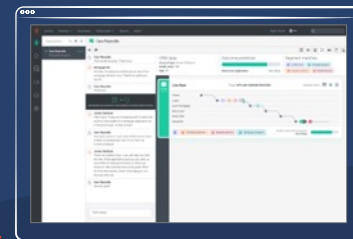
INNOVATION VELOCITY



AUTOMATE EVERYTHING

20,000+ production code
changes per year

EASE OF CONSUMPTION



CLICK TO DEPLOY

New capabilities every week.
Activate in your customer portal

Unmatched Scalability – Trusted Platform

GLOBAL



AVAILABLE VIA 9 REGIONS

2 US, 2 EU, UK, Canada, Japan,
South Korea, Australia

SECURE & RESILIENT



99.998% AVAILABILITY

GDPR, ISO27001, ISO27018,
SOC-2, HIPAA, PCI

TRIPLE DIGIT GROWTH



ADDING 20K+ AGENTS / MONTH

Our GC growth is **your advantage**.

Genesys Cloud is currently
powering 2500+ contact centers



Digital Transformation in Banking Services

Márcia Machado, Senior Account Executive

4 de Novembro de 2021



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Genesys

DELIVERING **EMPATHY** ACROSS
ALL BRAND TOUCHPOINTS



GENESYS® IS THE GLOBAL LEADER IN CLOUD CUSTOMER EXPERIENCE AND CONTACT CENTER SOLUTIONS

30+ Years of CX
Leadership



55 of Fortune 100
Companies rely on us



1500+ partners



70 Billion
Interactions/year



100+ countries



AI-powered



RELIABLE PROVIDER OF BRANDS WITH STRONGEST BRAND

FINANCIAL SECTOR 25%



INDUSTRIAL SECTOR 20%



TECHNOLOGY SECTOR 16%



HEALTH SECTOR 10%



PUBLIC SECTOR 7%



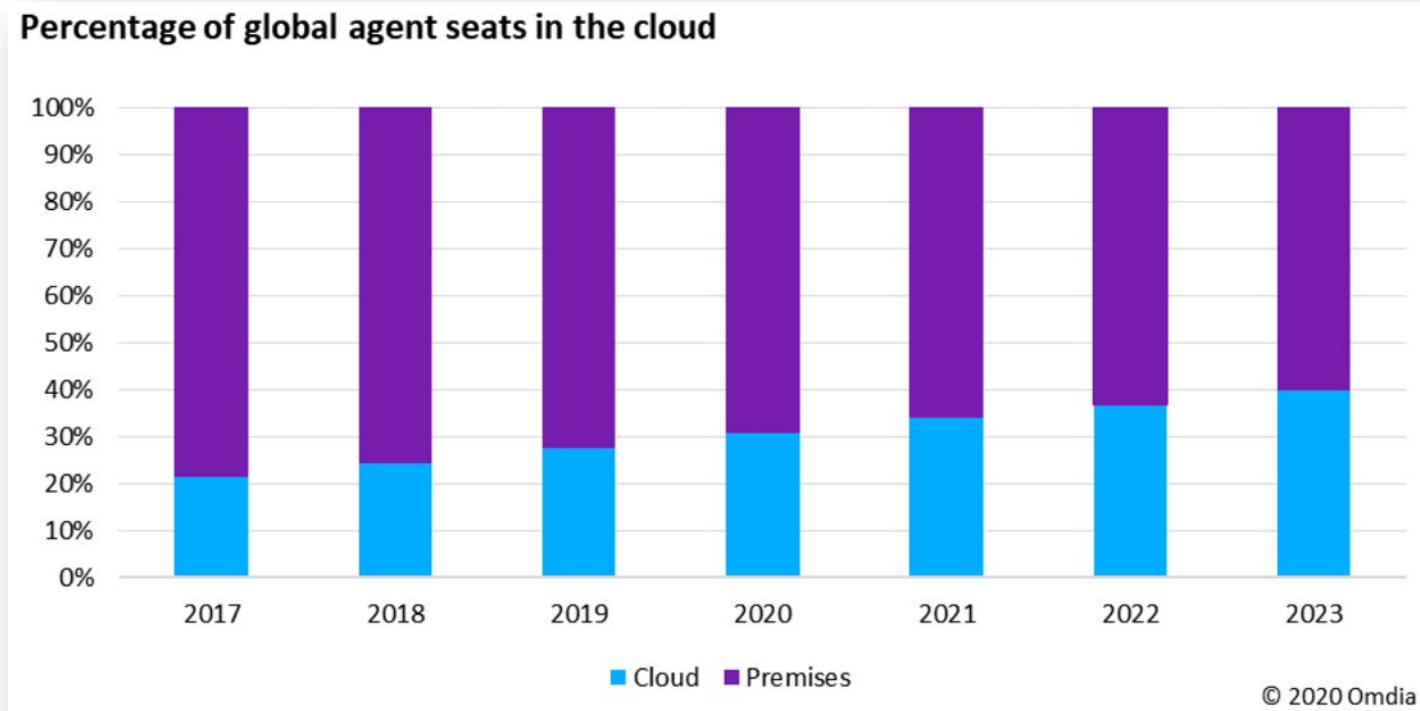
RETAIL SECTOR 7%



Strategy



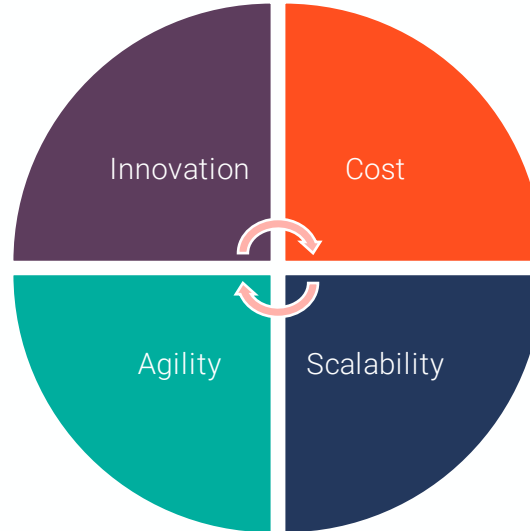
Velocity of Cloud-enabled Seats



Drivers of Cloud Adoption

- AI
- Predictive Engagement
- Predictive Routing
- WEM
- Open Platform
- Future Proof

- Time-to-Market
 - Services
 - Products
 - Changing requirements
- Switch on/off as needed
- Decoupling banks legacy IT



- CAPEX to OPEX
- Deployment
- Hardware / Maintenance
- Integration
- Updates
- Security

- Elasticity
Scale up /down on demand
- Users
 - Channels
 - Capabilities

Trends in Banking



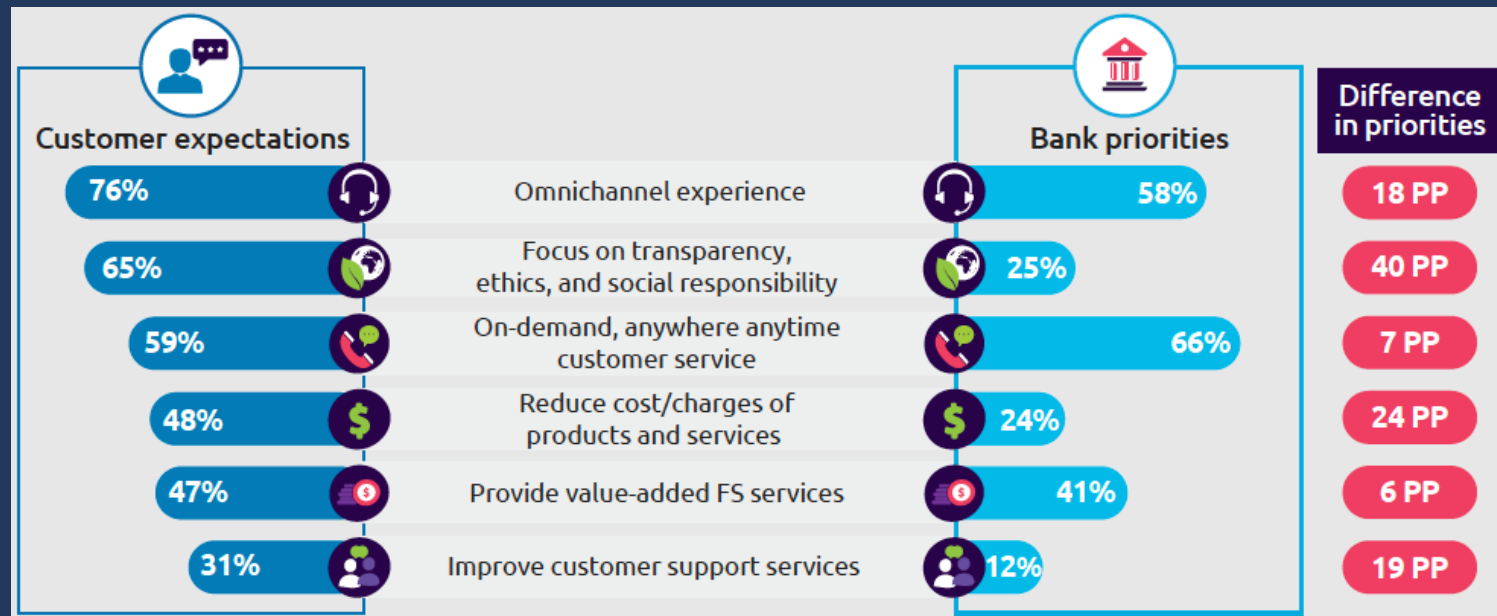
Best Banks vs Industry as a Whole



*) BCG, Global Retail Banking 2021

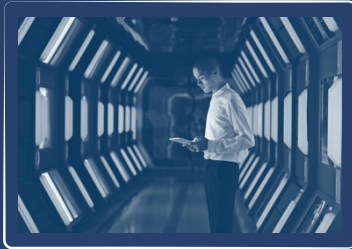
**) Genesys Case Studies

Gap between Customer Expectations and Bank Priorities

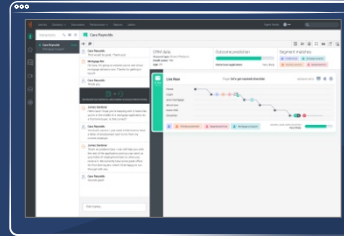


Customer Service **MEGATRENDS** for 2021

**AI-FUELED DIGITAL
EXPERIENCES UNDERPIN
GREAT CUSTOMER
SERVICE**



**MODERN AGENT
DESKTOP EMPOWER
AGENTS TO BEST SERVE
CUSTOMERS**



**CUSTOMER SERVICE
TECHNOLOGY ENABLES
RESILIENCE AND
SUSTAINABILITY**



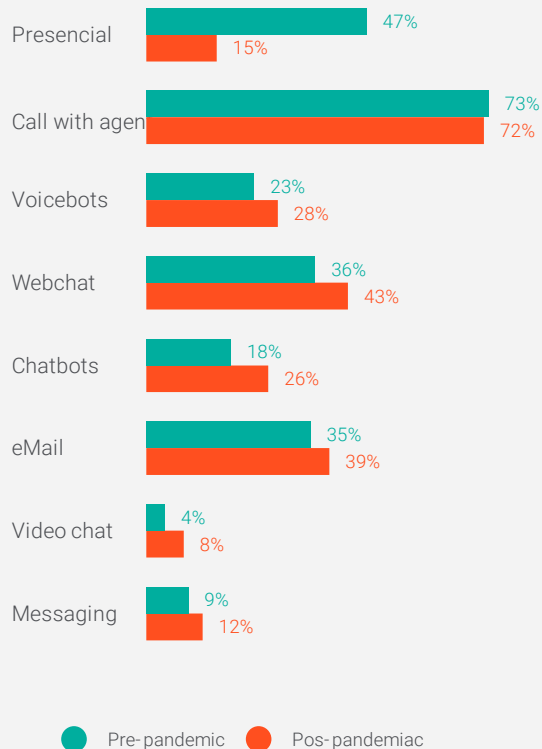
THE INTERACTIONS ARE CHANGING

DIGITAL INTERACTIONS

webchat and chatbots are the
channels as the fastest growing
globally



Customer Service – use of channels before and after pandemic



19%

Consumers have started using **CHATBOTS** since the beginning of pandemic

45%

Consumers use **WEBCHAT** to interact with Customer service

100%

Increase **VIDEO CHAT**

IMAGINE A WORLD WHERE... ARTIFICIAL INTELLIGENCE

WORK IS
MORE
INTERESTING

ELIMINATE
MUNDANE
TASKS

MAXIMIZE
EFFICIENCY

CUSTOMERS
LOVE YOUR
BRAND



WHY AI MATTERS

54% of managers' time is spent on admin tasks

84% of managers say AI will make their work more interesting

64% of AI adopters said AI enabled them to establish the competitive edge

Customer service is consistently

1 OF THE TOP 3 AI-driven use cases across all industries

Sources: HBR, Forbes, Deloitte, MIT Tech Review



 GENESYS

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2021

300% more remote work vs. pre COVID

40% more digital service interactions

65% companies engage virtually first

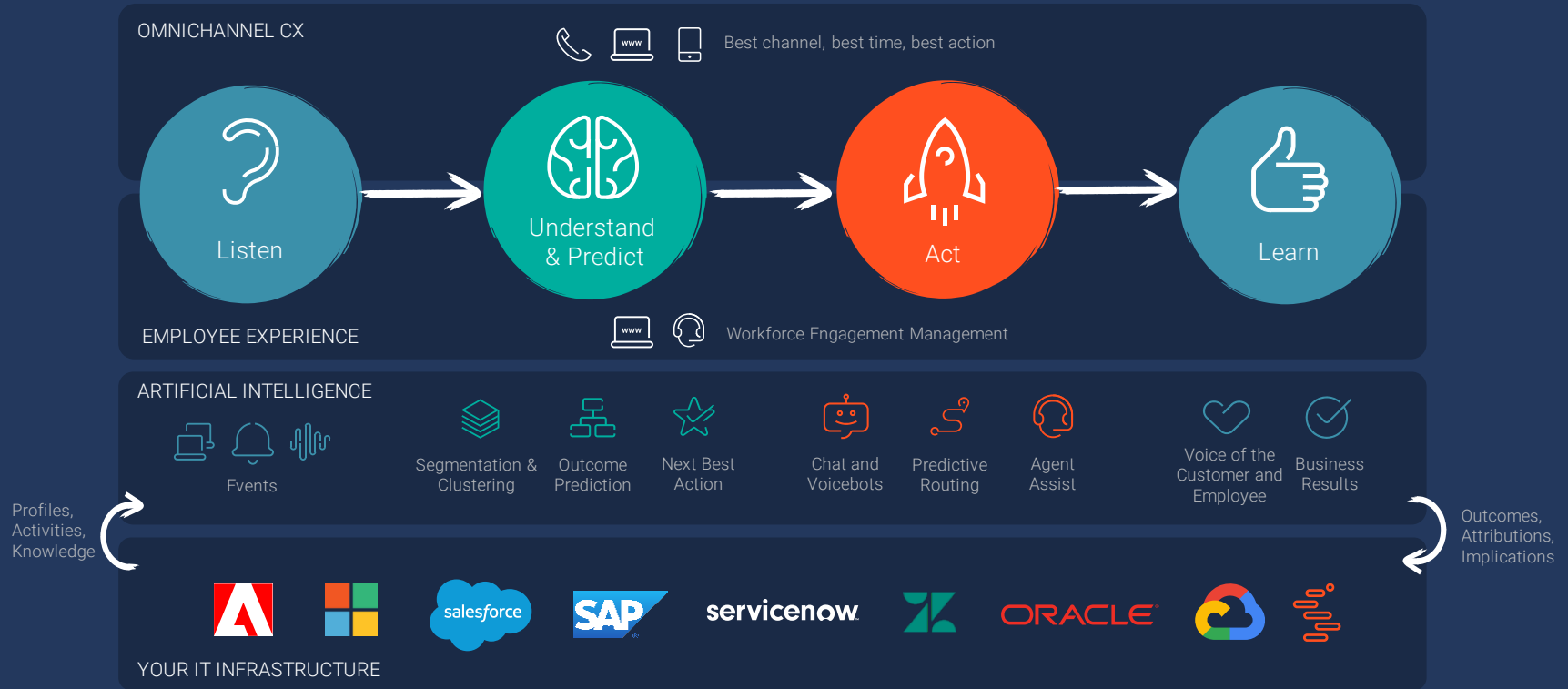
2022

50% contact centers run in the cloud

70% contact centers use (some) AI

85% service interactions are virtual

ARTIFICIAL INTELLIGENCE IN ACTION WITH GENESYS

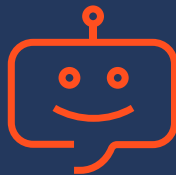


AI PORTFOLIO



Predictive Engagement

Capture, qualify and engage your customers or prospects in real-time at the right time to achieve your outcomes



Chatbots & Voicebots

Native & 3rd Party self service capabilities. Seamlessly transition to an agent with full context



Predictive Routing

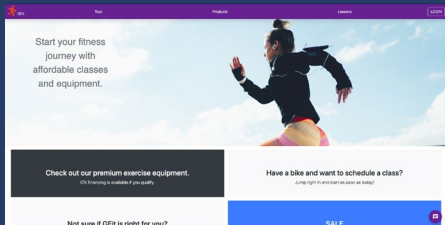
Determine the best possible match between customer and available agent



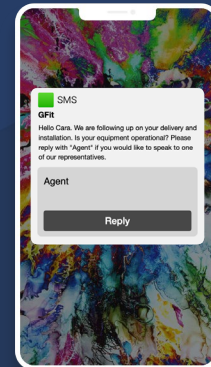
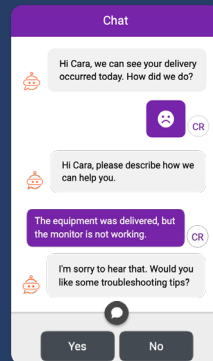
Agent Assist

Real-time recommendations and coaching

AN END-TO-END AI POWERED DIGITAL EXPERIENCE



Based on segment matched, Predictive Engagement triggers a web message asking about recent delivery



1

2

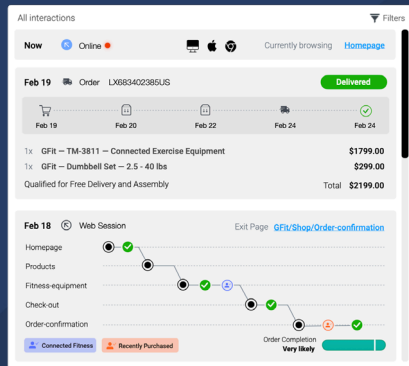
3

4

Maria visits gfit.com after receiving a piece of fitness equipment and the monitor doesn't work

Genesys Predictive engagement starts to track and visualize the customer experience

Segment: Recently Purchased



Maria interacts with the bot

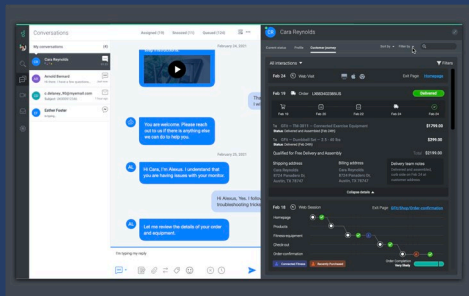
The chatbot provides tips and tricks to fix the monitor

Knowledge platform provides a step-by-step video tutorial

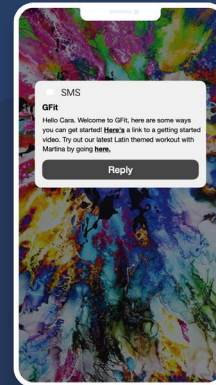
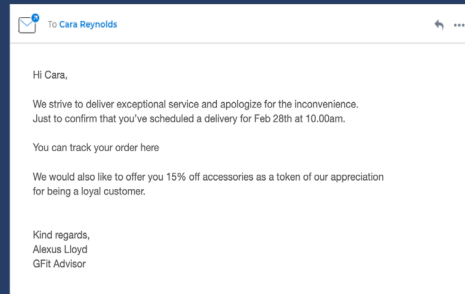
Gfit reaches out to Maria to ensure the monitor is working

The call is escalated to an agent

AN END-TO-END AI POWERED DIGITAL EXPERIENCE



Smart Agent Assistance tools provide next best action and orchestrate steps across the experience.



5

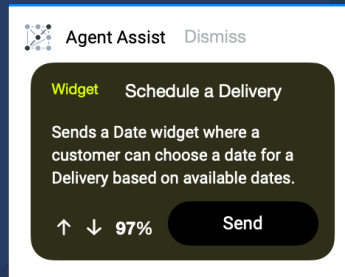
6

7

8

The agent is provided with full history and context of the interaction to allow for personalization and empathy

The agent can interact with Maria about the recent delivery and equipment failure



Agent can solve the issue efficiently and empathetically.

Email confirmation is sent to .

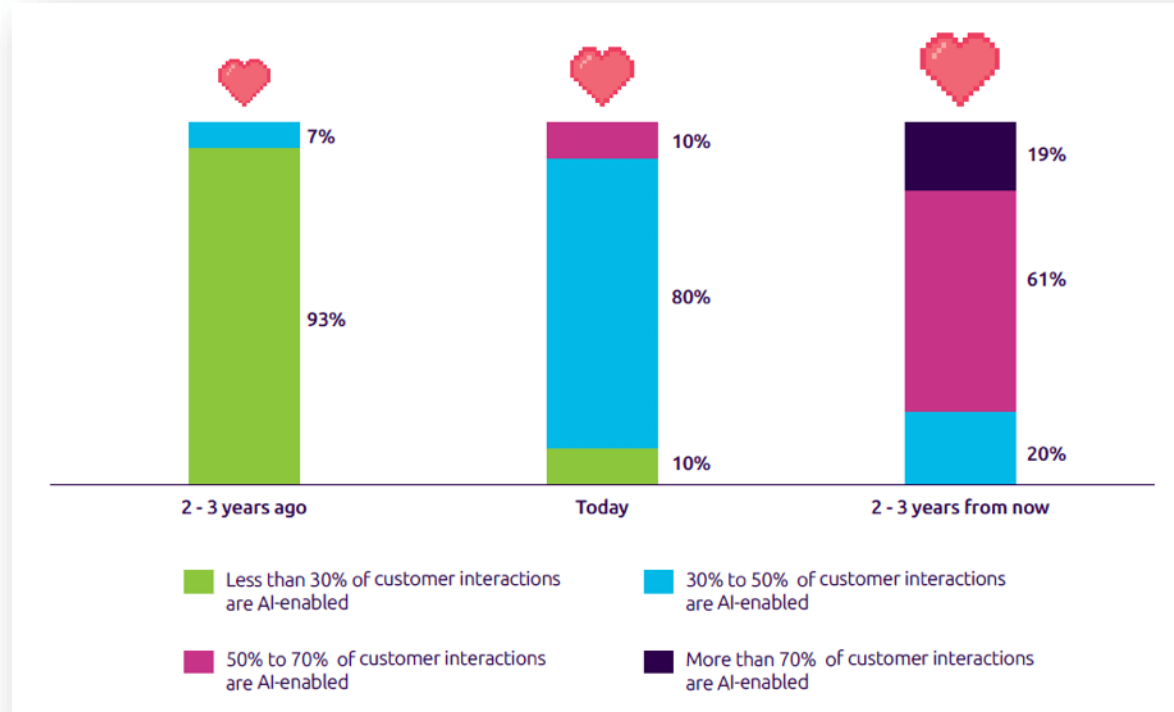
AI powered summarization accelerates post call work

AI powered Digital Experiences delivering Empathy at Scale



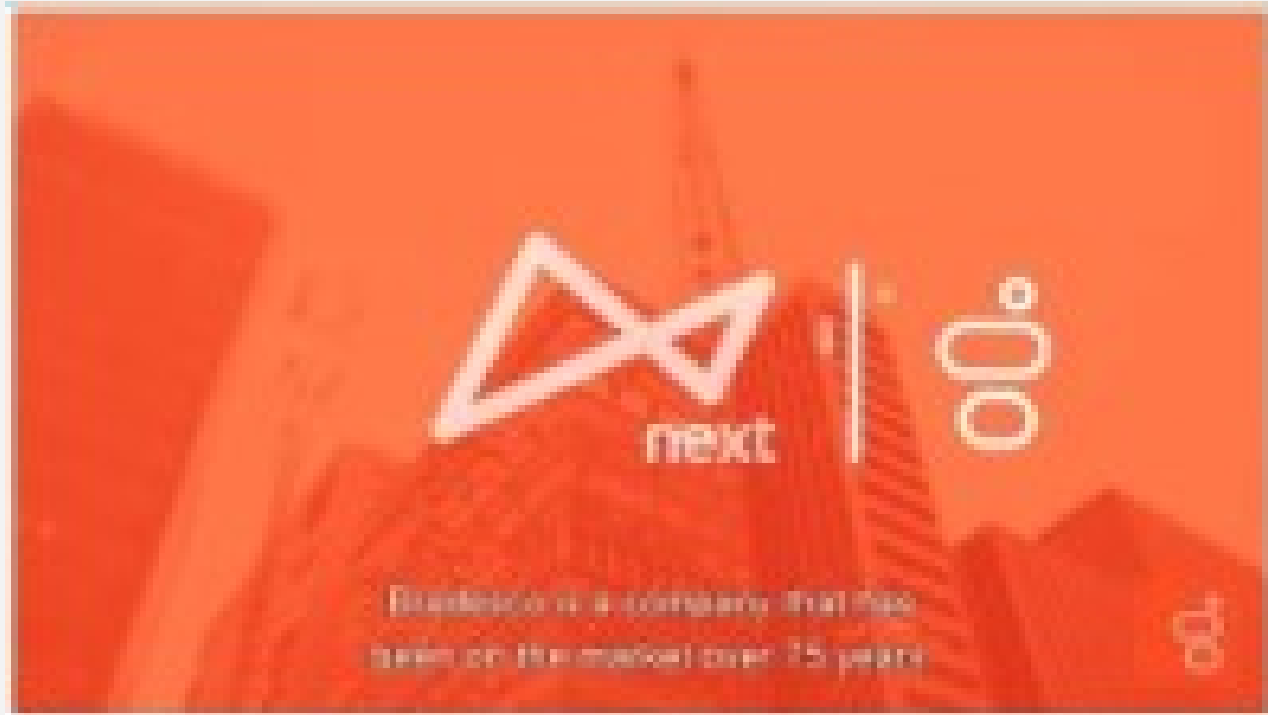
GENESYS™

Progression of AI-enabled Customer Interactions



Chatbot Customer Example

Bradesco



THANK YOU

Márcia Machado

— Marcia.Machado@genesys.com

— +351911002861

