

Cresta for Financial Services

When it comes to financial services, whether banking, lending, or investment, customers expect their experience to be fast, easy, and secure regardless of channel. Financial service companies are focused on exceeding customer expectations while staying compliant with strict regulations.

Cresta's Real-Time Intelligence suite helps financial businesses unlock growth, deliver better customer experience, and ensure compliance — all while helping managers and agents work more efficiently and effectively.

Reduce Risk and Increase Value with Real-Time Intelligence

Cresta offers a comprehensive platform for delivering exceptional customer experience across the customer journey.

Uncover best practices to boost revenue and drive compliance. Earn customer trust with efficient and personalized customer service. Turn complex conversations into actionable insights. In an industry where every conversation counts, count on Cresta.



Enhance CX & hit key KPIs

Identify easily-automated conversations to cut call volume and wait times. Support agents through complex interactions and streamline access to information on a single platform for lower AHT, higher FCR, and greater CSAT.



Improve compliance, cut costs

Take the stress out of compliance with Real-Time Hints for agents, Alerts for managers, and Insights for leaders. No more time-consuming, labor-intensive QA, and no more costly compliance infractions.



Scale expertise to every agent

Learn what top performers do differently and deploy those habits to every agent with updated Hints, Guided Workflows, and Customized Coaching Plans. Supported agents are happier — supply the tools for success and watch ESAT climb.



Modernize, strategize & adapt

Break free from the industry's slow-moving reputation and create a tech-enabled culture. Find emerging trends in customer complaints, uncover opportunities for upselling, and stay steps ahead of competitors.

Build a more human experience to boost revenue

In financial services more so than any industry, customer relationships are built on trust. But as contact centers struggle with agent attrition and agents grapple with high volume and complexity, service levels drop, impacting brand and customer loyalty. Providing more intentional care leads to more satisfied customers — and a quantifiable impact on businesses.

With features like Hints, Guided Workflows, Knowledge Assist, Automatic Notetaking and more, Cresta helps:

- Remind agents to use soft skills like empathy on revenue-driving conversations such as collections calls
- Supply the information and guidance agents need to expertly navigate complexity in real-time, driving down AHT and boosting FCR
- Offload administrative tasks to improve agent engagement during calls and cut time spent on ACW for a more efficient, more productive contact center

Reduce compliance errors — and unnecessary cost

Mitigating risk is no easy task. Regulations vary by state, making it especially tricky to track and manage compliance, resulting in added risk and costly infractions. missteps send businesses stumbling into costly compliance infractions. Stop stressing over avoidable compliance errors and scale best practices with features like:

- Real-time hints that remind agents to stay complaint based on pre-programmed rules that account for team, geography, and more
- Alerts to notify managers of potential compliance infractions, plus Live Assist capabilities to help get the conversation back on track
- Comprehensive Insights that offer enable data-driven adjustment and deployment of best practices in real-time

Simplify omnichannel support around the clock

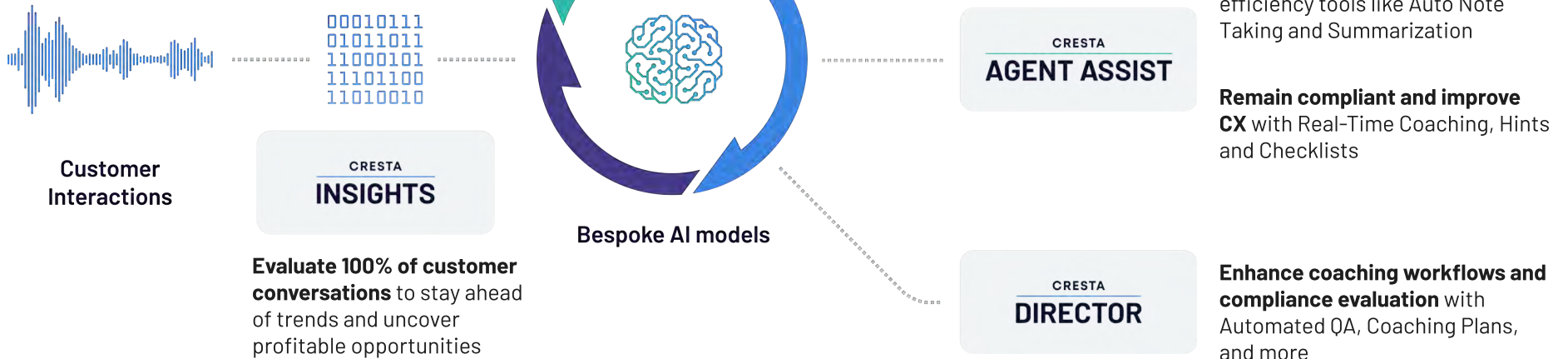
Finances still matter after business hours. But when a customer's credit card is mysteriously declined, they notice fraudulent activity, or face any number of other urgent matters during off hours, they usually have just one option: wait. Staffing at all hours is cost prohibitive, but Cresta's Chatbot enables:

- 24/7 Intelligent Support guided by the insights gained on agent interactions, meaning no forced tradeoff between cost-effectiveness and quality
- An omnichannel experience to reduce call volume during business hours
- Automation of simplest conversations, freeing agents to focus on complex customer inquiries



Cresta's Real-Time Intelligence unlocks new possibilities for financial services

As the central hub of intelligence, Cresta improves with every conversation



With market volatility underscored by unstable staffing trends and steep competition, there's no margin for error in financial services. But as businesses continue to rely on fragmented tools and slow QA processes, agents aren't empowered to perform their best and leaders lack visibility into how they can help. It's time to anticipate customers' needs, give agents tools to easily navigate complex situations and sidestep risk, and build a loyal base with personable and accessible support. Scale greater efficiency and higher performance to entire teams. Boost compliance. Unlock revenue.

Partner with Cresta and watch as Real-Time Intelligence translates to real results.

300%
increase in revenue
per agent

10%
lower AHT

20%
higher CSAT

5x
higher adherence

60%
increase in conversions

Contact pro@cresta.com to learn more

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