

A single view of the customer- Banking

The Problem

The client had several different lines of business systems that have been implemented at different times, and by different business units. A single customer can exist in one or more of these systems, potentially having different details and a different customer number across the systems. When a customer contacts the clients customer support team, the support agent must login and use several different systems to try to assist the customer, which is time consuming and could lead to a bad customer service experience. The existing systems are also designed for onboarding a new customer therefore the ability to get a timely and holistic view of the existing customer is not good. The client had identified that they need to provide their customers with a much-improved customer service experience.

The Solution

BITQ were engaged to build a *single view of the customer* for the client. Using Microsoft Power BI, BITQ provided a single report that an agent can access to get a single view of the customer that they are engaging with. The agent simply inputs any one of the customer's customer numbers, and the report contains all the information from the disparate systems. The first 2 pages are a summary, giving the agent a quick overview of the customer. The remaining 14 pages provide the agent with details of all the different products that a customer may have across the business. The summary pages bring together customer contact information, number of accounts, account types, account balances, health policy information, equity, net position and related member details. The front-line staff now have available at a glance, key information that would have previously taken several minutes to retrieve from legacy customer portals. Interactions with customers have dramatically improved and the user experience is greatly enhanced. The agents are very pleased with the improved capability and are confident that the solution will lead to better quality customer service and ultimately improved customer retention.

The Outcome

The client reduced their customer engagement time, dramatically. This allowed the client to service a greater number of customers, which in turn allowed for an improved customer service experience. There was no doubt, that post implementation, the business operators, the Key Stakeholders, and the customer, all benefitted from this greatly.

Technical Details

The client opted to not use the Power BI cloud service, but instead chose to use Power BI Report Server (on-premises). BITQ implemented an SQL Server Analysis Services tabular model/cube which contains all the customer information, collated from several different source databases. BITQ developed a Power BI report which has a live connection to this SSAS Tabular model, and has been deployed to Power BI Report Server. Reports are fully interactive and users can very quickly switch from member to member in the browser-based reporting interface. The solution is easily scalable to 100's of frontline staff.