

blueprism[®]
Service Assist

CONTACT CENTER TRANSFORMATION WITH BLUE PRISM

Use Cases

Commercial in Confidence



Automating High Value Use Cases Across Industries

Plus optimizing cross-selling and up-selling opportunities



Financial Services

Inbound

- New customer onboarding + KYC and Customer Due Diligence (CDD)
- Account servicing (changing address/fee inquiry)
- Product servicing – activate new credit cards/card blocking
- Issue resolution: Fraud investigation, collections, complaints/payment failures
- Loan/claim servicing
- Policy renewal/cancellation
- 24/7/365 FNOL
- FEMA claims administration

Outbound (Proactive)

- High payment/fraud detection
- Policyholder retention
- Relationship management



Telco

Inbound

- Process service cancellation/activation
- Activate line/service
- Monitor and resolve consultation (back-office)
- Search offer/promo
- Create service ticket for failures
- Check order status
- Change contract owner

Outbound (Proactive)

- Offer tariff change
- Process order repair
- Tax automation
- Digital claim processing
- Payments issued to vendors
- Aging report process, debtor's confirmation and customer validation



Utilities

Inbound

- Payment arrangements, billing, stop/start service
- Energy efficiency, smart home
- High utility bill
- Meter reading
- Service outage/storm response with emergency dispatch

Outbound (Proactive)

- Collections – 1st and 3rd party
- Maintenance reminders and appointment setting
- Green energy initiatives
- Natural gas sales
- Customer satisfaction surveys
- Demand response initiatives
- Late payment notification
- Peak time billing/savings update

Pre-call:

- **Fast-Start and Fast-Assist for Agents**
- **Simplified Desktop**
- **360° Degree Pre-fetch**

Fast Start and Fast-Assist for Agents

Simplify and Speed Up Agent Login/Logout

Problem:

Agent spends considerable amount of time with login/logout at their shift changes and during their customer interactions



Enable “fast-start” for agents with automation of login/logout sequences during their shift change and during customer interactions

Resolution:

BP Service Assist is able to automate and offload those login/logff and other in-transaction tasks from the agents



Simplified Desktop with a Dynamic UI

Consolidating Multiple Functions Within 1 or Multiple Application(s)

Problem:

Customer Agent needs to make multiple moves, adds and changes to one or multiple applications



Resolution:

DWs can simplify extraction/adds/updates within one or multiple applications

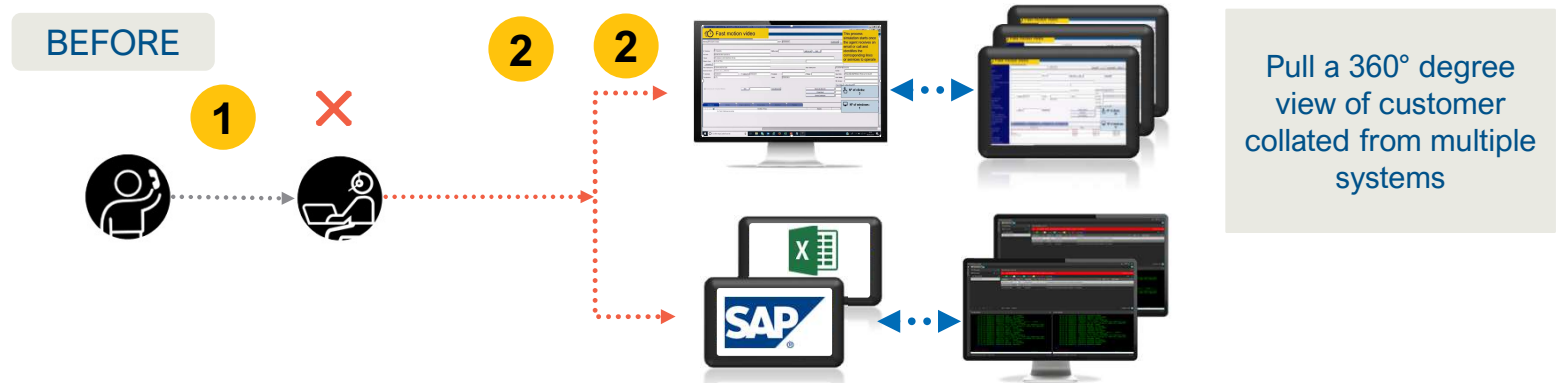


360° Degree View of Customer

Providing the Agent With a 360° Degree View of the Customer

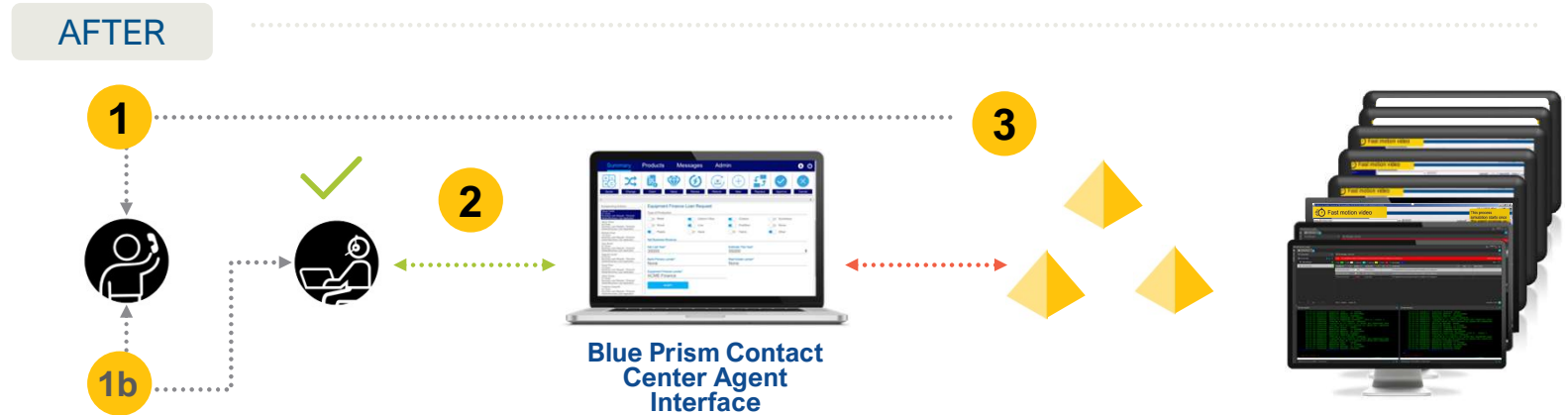
Problem:

Customer or Agent needs to manually pull together multiple strands of information from multiple applications and data sources to create a 360-degree view of the client



Resolution:

DWs can pull together the 360-degree view of the customers consistently and help address a customer issue via self-service or provide it to an agent if the customer who gets to an agent



During Call:

- On-Demand Customer Info Retrieval/Update
- Suggest Customer Next Best Action (to Agent)
- Secure URL for Customer Review and Approval

Swarming with Service Assist

Update of Customer Info

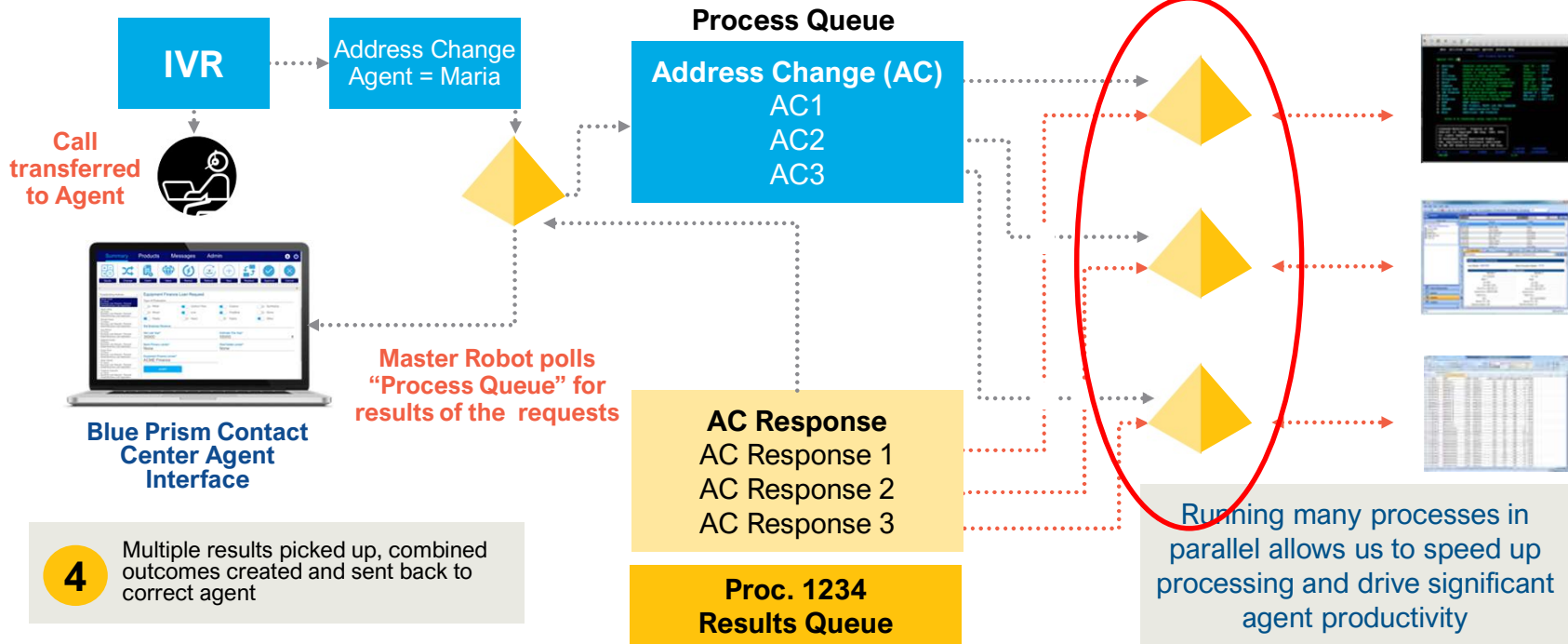
Problem:

Customer or Agent needs to manually pull together multiple data points to support request

Resolution:

DWs can pull together info and provide it directly to the customer or to an agent if the customer chooses that option

- 1** IVR interaction results in unique client interaction that is routed to agent.
- 2** Sub-tasks created based on transaction needs and managed by queue.
- 3** Multiple robots pick up sub-tasks, processes and sends the results to the results queue



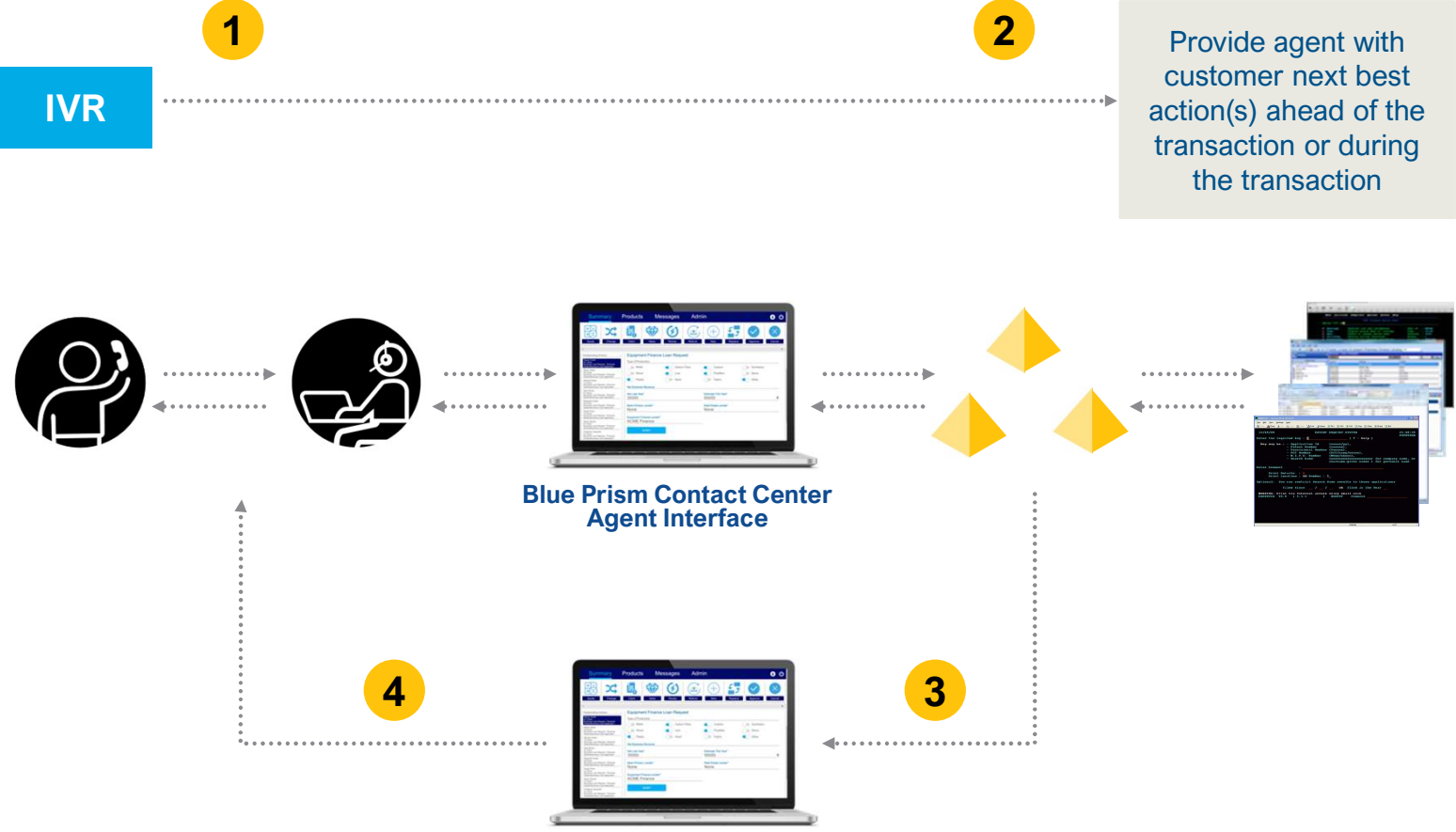
Customer Next Best Action

Problem:

Agent must manually research and provide what the next best action is for the customer

Resolution:

DWs are providing relevant info for the next best action



Secure URL for Customer Review and Approval

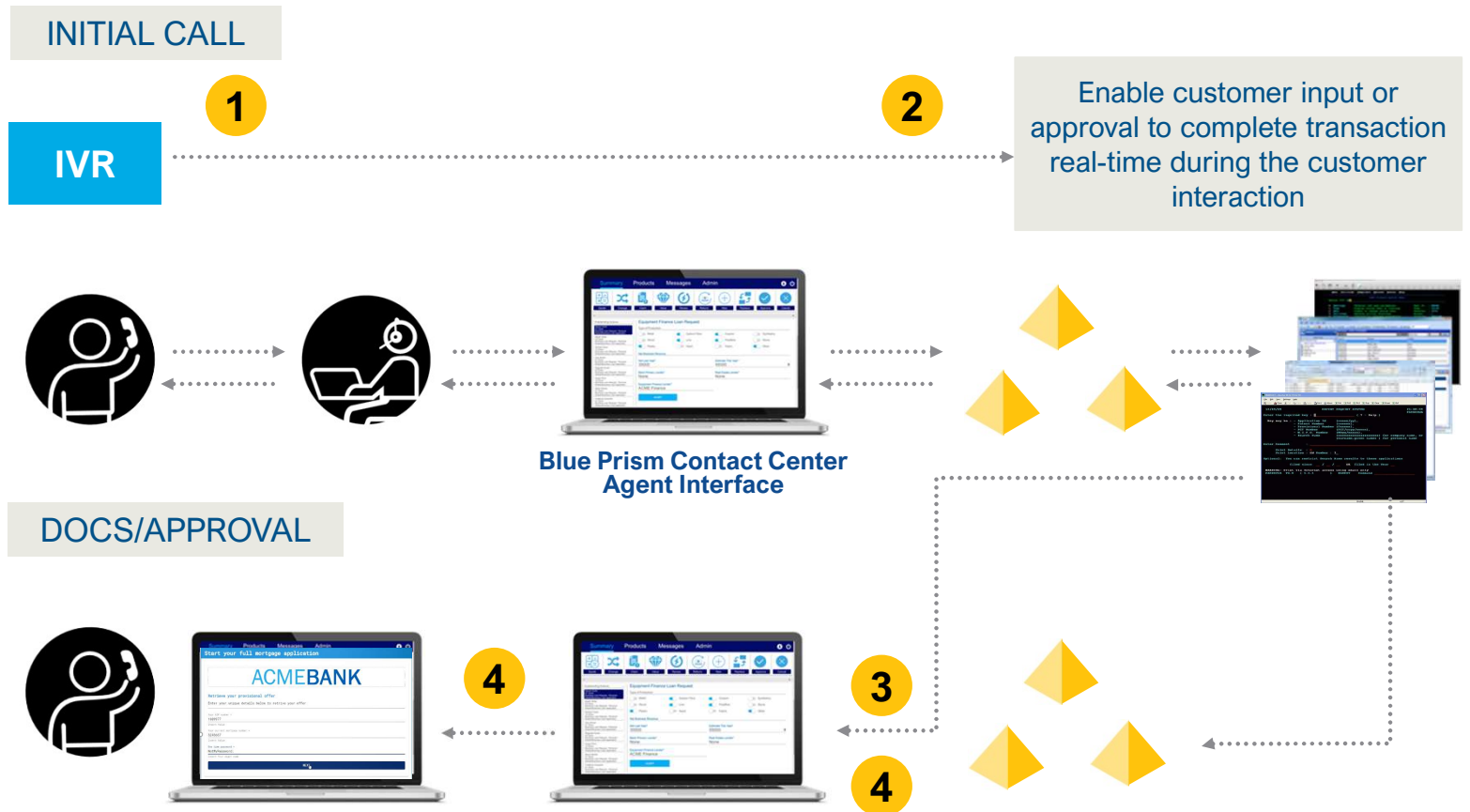
INITIAL CALL

Problem:

Agent needs to figure out which documents are right ones to send to customer and follow-up (possibly multiple times)

Resolution:

Agent engages customer for approval or input real-time and gets it done



Post-Call

Customer follow-up

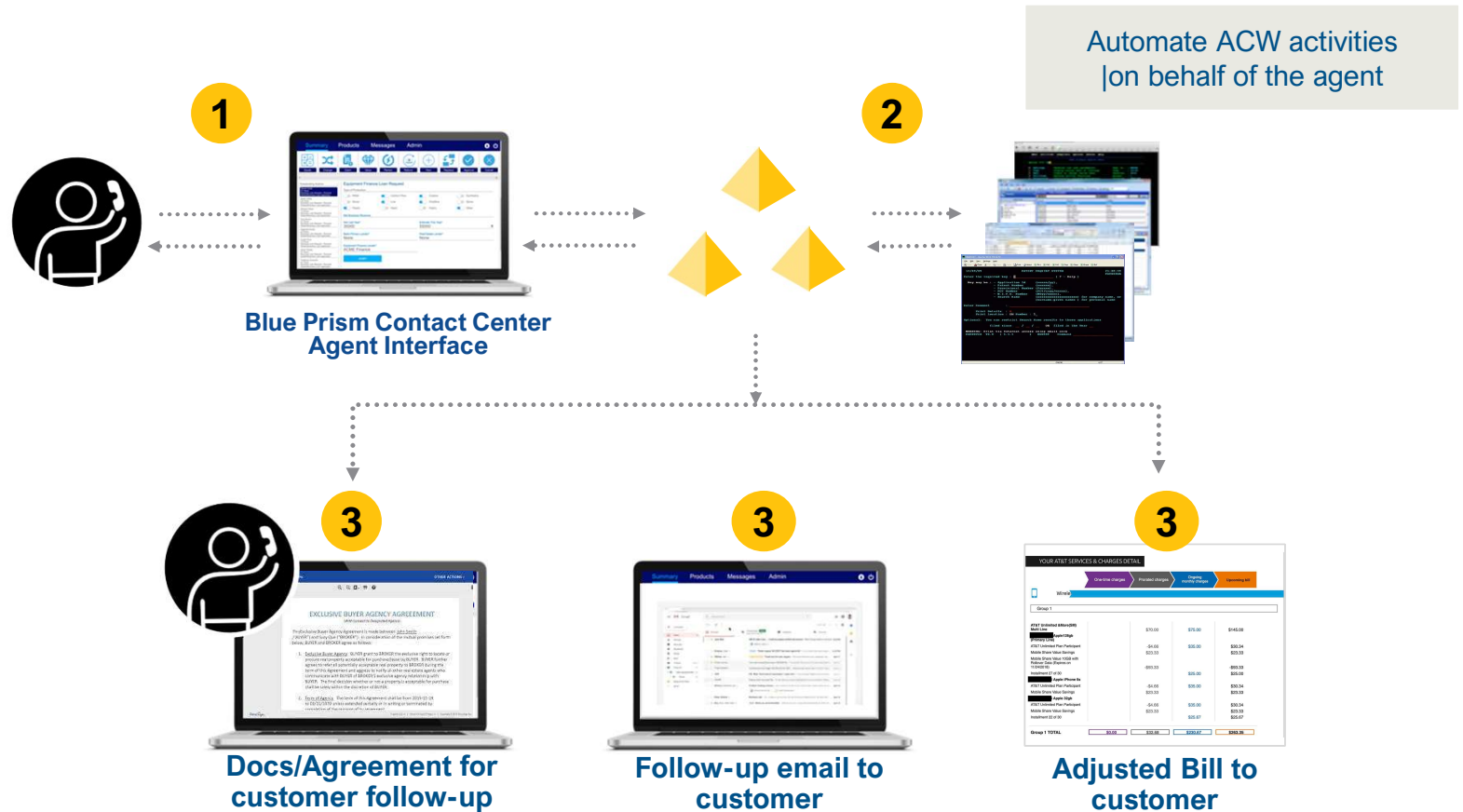
Secure URL for Customer Review and Approval

Problem:

After Call Work activities for the agent are usually manual, rules and scripts based which can be easily automated

Resolution:

Use Service Assist to get a majority of ACW activities done

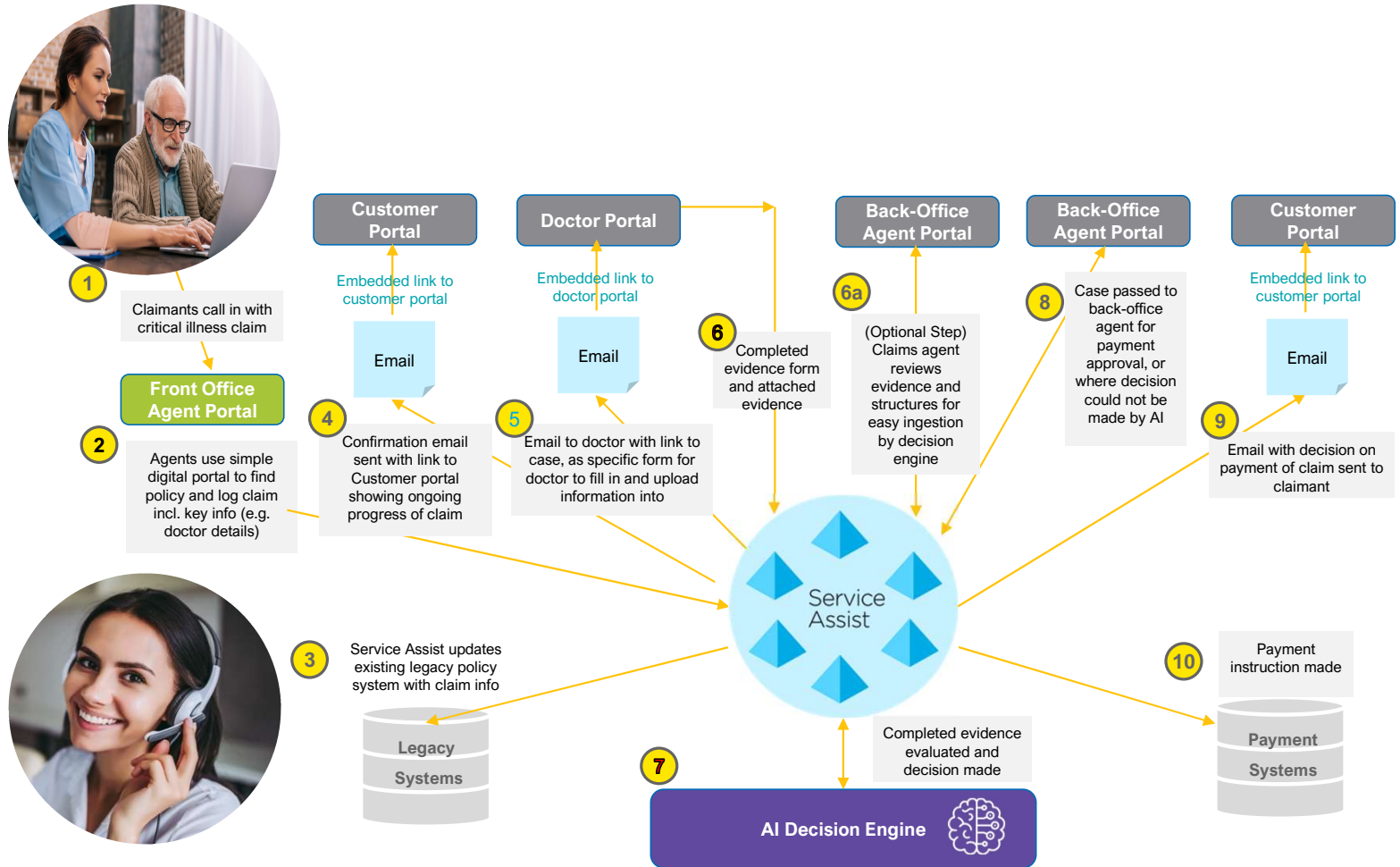


End-to-end Transformation

Insurance Use Case

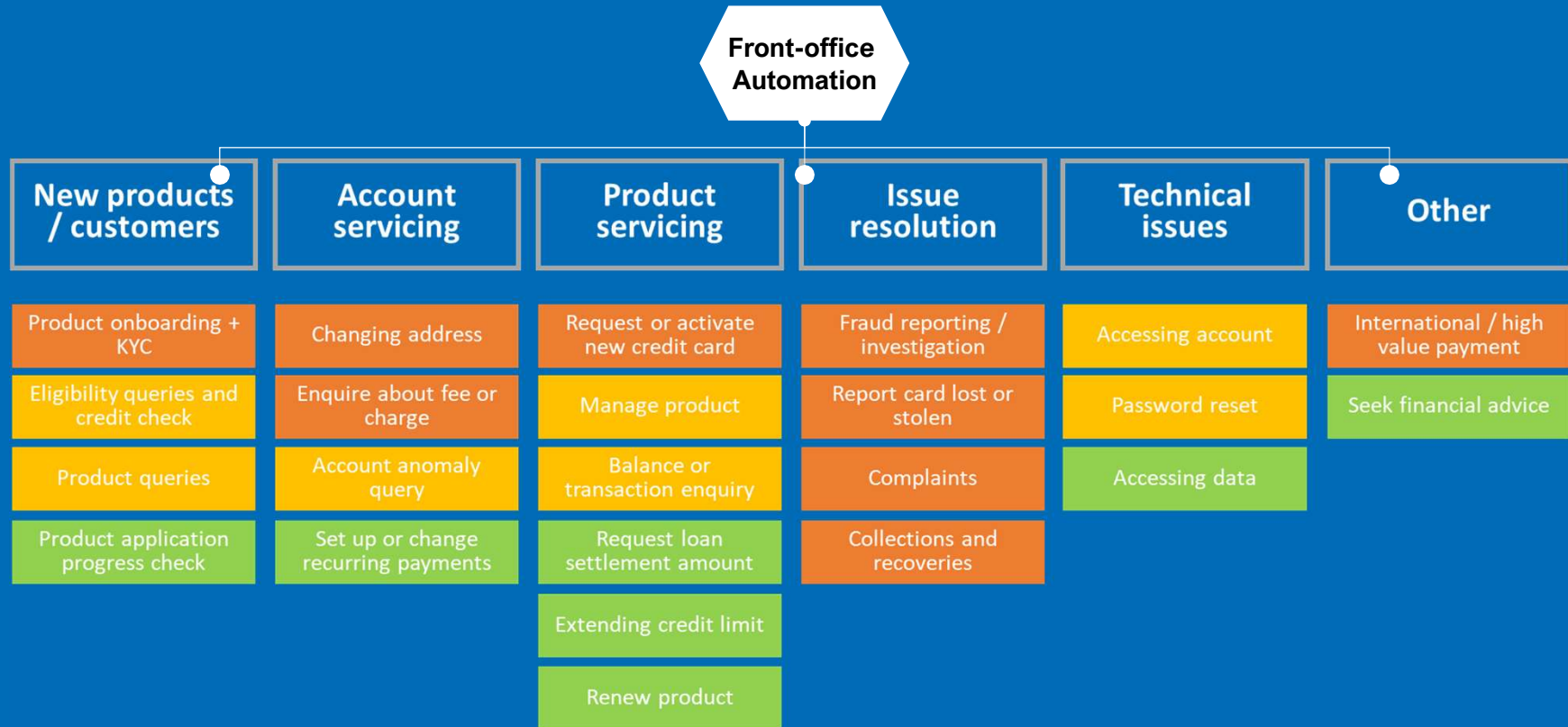
Reimagine: End-to-end digital transformation with a human touch

A real health insurance claim process improved 5 days to 5 minutes



Financial Services Use Cases

Financial Services Contact Center Processes Ripe for Automation



FTE demand ■ Low ■ Medium ■ High

Payment or Refund processing

Provide guidance for agent to gather/confirm information from customer in the order needed prior to submitting to back end systems for processing.

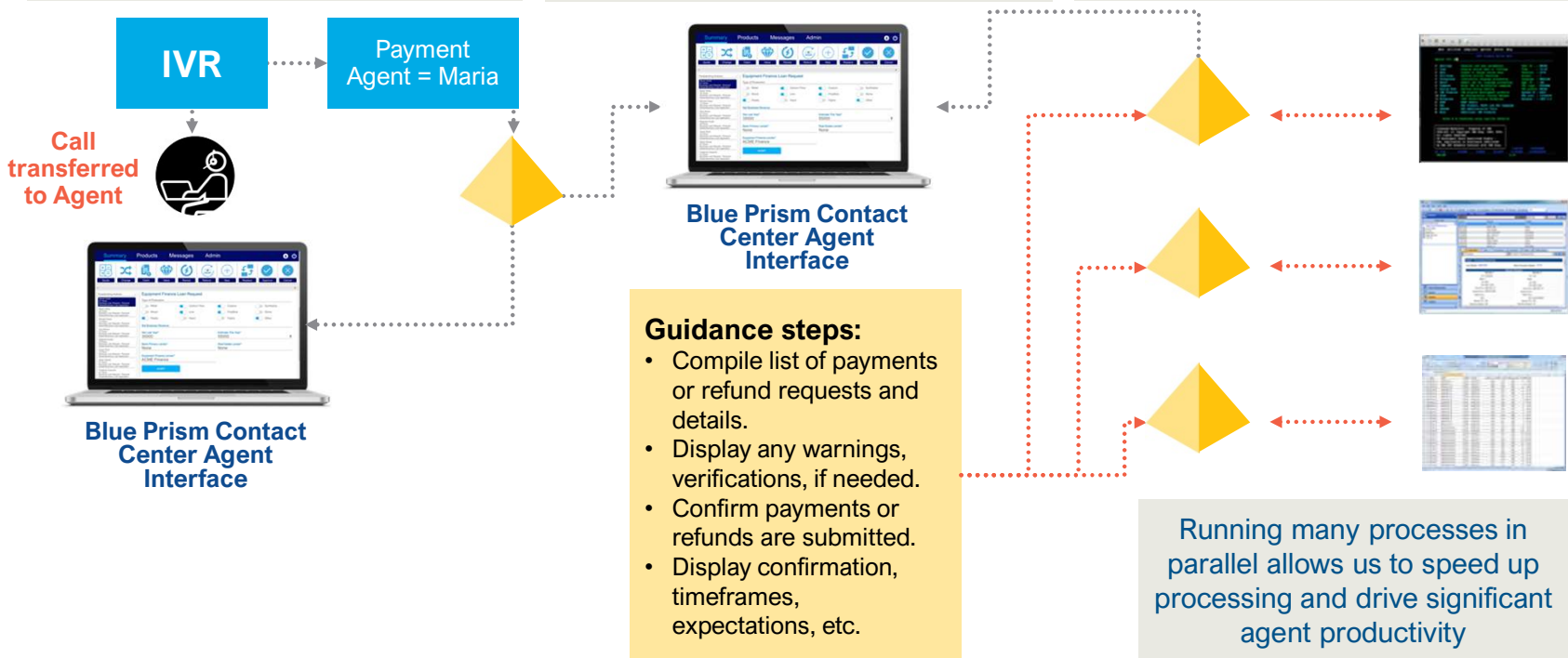
Problem:

Agent gathers information for payments to be processed or refunds required. Confirmations, timeframes, payment details are confirmed multiple times for each payment or refund. Customers give or are given the same info multiple time.

Resolution:

DWs can pull together information from back end systems to display and guide agent through the process one time for all payments or refunds. Service assist can also follow up with any secure links to validate info in forms for the customer to complete the requests.

- 1** IVR interaction used to trigger and gather information to authenticate customer.
- 2** After customer authentication, Service Assist guides agent through process using forms and scripts.
- 3** Multiple robots pick up sub-tasks for submissions to back end systems and return any information, status, confirmation, etc. to progress through call flow.



Transactions for dispute or fraud resolution

Provide guidance for agent to gather/confirm information from customer in the order needed prior to submitting to back end systems for processing.

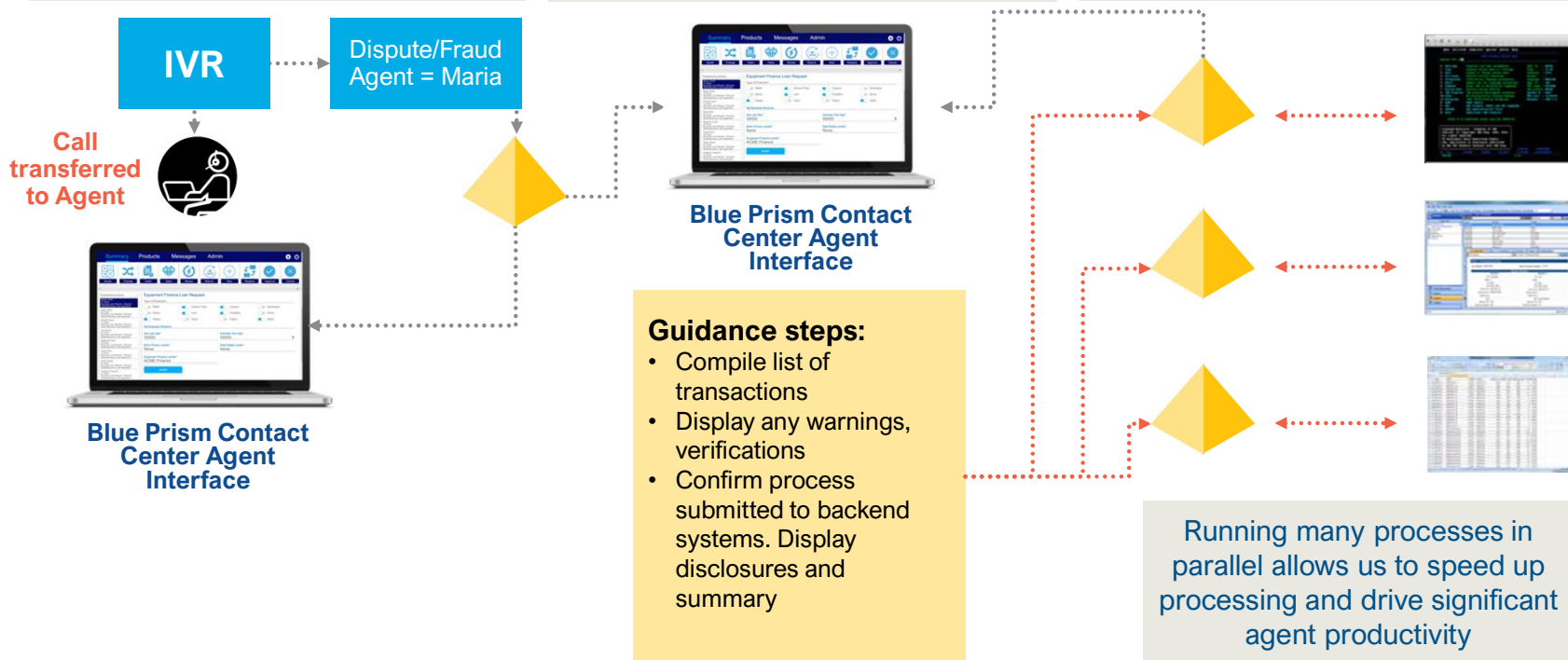
Problem:

Agent needs to ask various questions to gather information about single transactions for dispute or fraud. This is repeated for all transactions. Also, summary and disclosures are read multiple times for multiple transactions.

Resolution:

DWs can pull together information from back end systems (such as transactions) and guide agent through the process one time for all transactions.

- 1** IVR interaction used to trigger and gather information to authenticate customer.
- 2** After customer authentication, Service Assist guides agent through process using forms and scripts.
- 3** Multiple robots pick up sub-tasks for submissions to back end systems and return any information, status, confirmation, etc. to progress through call flow.



Utilities Use Case

High Bill Rate

Schematic Diagram



ACCOUNT HISTORY CHECK & ELIGIBILITY CHECK FOR R917

1. **SO check** - Check if there are any recently completed/created relevant field orders. Display the information on the bot's screen, if available
2. **Payments Check**– Display the list of recent payments made by the customer along with any past due balances and account transfers which may be the reason for the high bill
3. **BPEMs check**- Check if there are any recently completed/created R917 and related BPEMs. Display the information on the bot's screen if available
4. **Interaction Record history** – Check the IR history for any recent conversations/communications with the customer and display the details, if available

ACCOUNT AND BILL PERIOD ANALYSIS (AFTER CHECKING FOR ELIGIBILITY)

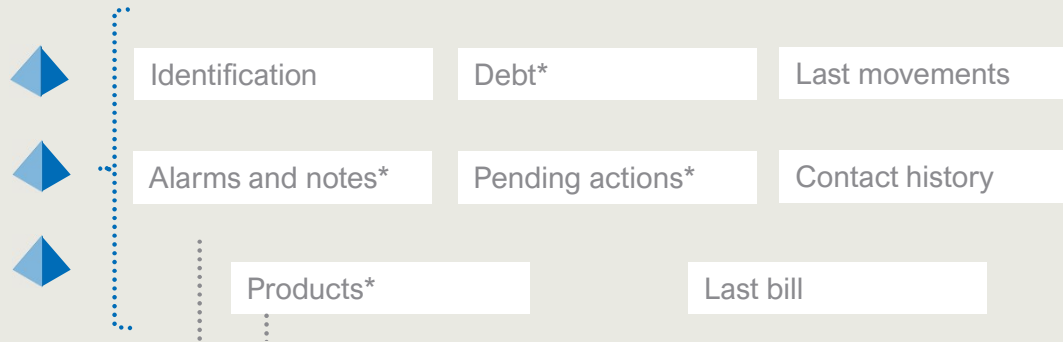
1. **Month on Month Billing details**- Gather the bill amounts for the last 12 months and display them for monthly comparisons
2. **Daily Usage v/s Daily temperature comparison**– Get the daily consumption for the high bill month from AMI portal, get the daily temperature from Accuweather. List the daily usage and temperature comparison on the CR's screen and highlight any spikes/trends
3. **Billing Statement PDF** – Extract the current bill statement PDF and provide the link to the billing statement
4. **Analysis and Talking Points** - Further analysis of the bill period to provide the CR with the ability to guide the conversation:
 - Average Daily Usage month-by month comparison
 - Identify any recent rate changes during the billing period
 - Comparison of number of days in the billing period
 - Analysis of meter reads – The meter reads for the last 3 months (actuals or estimate). Flag the estimated reads
5. **Summary Questions**– Open the summary questions tab in high bill analyzer in CRM and provide the link to CR for quick access

Additional Use Case

Using Multiple Digital Workers Reduces Call Times Increases Agent Effectiveness

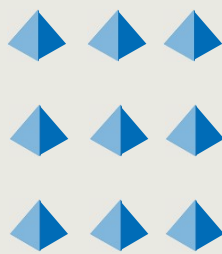
1

IVR triggers initial 3 digital workers delivering customer 360-degree view, data ready when call delivered to agent



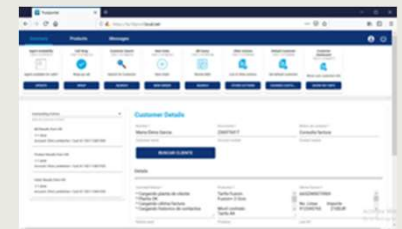
2

Predictive data retrieval: depending on data retrieved and simple process logic, multiple additional digital workers can be triggered to get useful next data



3

Real-time data delivered
Digital workers push information directly to agent, so agent has info. without having to do anything



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