

# Streamlining Case Management and Consumer Experience for a Leading Financial Institution in Singapore

## Customer Profile

The financial institution is committed to building a robust and progressive financial ecosystem. By adopting advanced technology and refining operational practices, it aims to enhance customer experiences and maintain the highest levels of efficiency and transparency.

## Location

Singapore

## Industry

Finance

## Platform

Microsoft Dynamics CRM

## Critical Needs

- A comprehensive, user-friendly, unified system to track and manage consumer information, feedback, and public inquiries related to financial institutions
- Gain data insights from cross-channel customer information to support data-driven decision-making to enhance service quality
- Efficient case management to seamlessly route cases and correspondences to the dedicated departments

## Solution

AvePoint Case Management System

## Success Highlights

- Advanced search functionalities helped with effortless case search and retrieval
- Streamlined process of tracking and resolving consumer complaints and inquiries
- Gained access to a real-time analytics dashboard, assisting with data-driven decision-making and improving service quality
- Improved response times on queries, enhancing customer satisfaction

## The Challenge

The financial institution is responsible for addressing the concerns of end users and businesses. However, it was receiving feedback through multiple channels – including website online forms, emails from consumer and webmaster accounts, phone calls, physical letters, and fax messages – to respond to customer concerns and inquiries.

This fragmented system lacked integration and visibility, causing delays in response times and difficulties tracking case histories. On top of that, it had two separate systems for consumer feedback. Due to the subpar experience of employees from its system, responding to customer queries has been taking a couple of days, leading to operational inefficiencies.

This data silo also prevented the institution from analysing consumer feedback effectively, collaborating with other departments on related concerns, and understanding how they can improve response times to consumers, along with other key performance metrics.

## The AvePoint Solution

The financial institution partnered with AvePoint to address its need for a unified and efficient case management solution that can help ease the burden of its staff and improve response times to queries. To address the issue, AvePoint designed and implemented the Case Management System, a tailored platform to streamline case processing, improve staff productivity, and enhance response times to consumer queries.

The solution includes:

- **Unified case management.** Provides a centralised platform for managing consumer complaints and public enquiries. By integrating data from multiple channels – including emails, phone calls, and online feedback forms – the financial institution gains a holistic view of consumer interactions, ensuring seamless feedback tracking and resolution across departments.
- **Integration with external systems.** Connects effortlessly with the institution's Document Management Solutions (DMS) and other key external systems, facilitating smooth data flow and cross-departmental collaboration.
- **Automated workflows.** Reduces manual effort by automating routine tasks, such as routing cases to appropriate teams based on predefined criteria, accelerating response times, ensuring adherence to service standards, and allowing staff to focus on higher value tasks.

- **Real-time analytics dashboard.** Generates complex reports, offering granular views of operational metrics to meet diverse reporting needs. AvePoint's system also seamlessly integrates with external tools, enabling the institution to leverage advanced analytics for deeper insights and enhanced decision-making.
- **Knowledge retention.** Captures institutional knowledge related to case handling, which supports ongoing training and enhances service delivery over time.

## The Road Ahead

As the financial institution continues to enhance its case management and consumer service experience, the organisation is committed to leveraging the full potential of AvePoint's system.

The system revolutionises the institution's approach to case management by consolidating feedback channels, automating workflows, and providing real-time analytics. Unifying consumer feedback and public enquiries into a single and efficient platform have significantly improved operational efficiency, reduced response times, and enhanced service delivery. The system's advanced features, including seamless integration with external tools and robust reporting capabilities, ensure the institution remains agile and data-driven in its decision-making, equipping it to adapt to evolving needs, deliver exceptional consumer experiences, and uphold its reputation as a financial authority.

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