



The Future, Realized: A Financial Services Story

Overview

This case study illustrates how a typical contact center manager—like you—can achieve measurable success using modern contact center software to monitor, manage, and drive performance across key metrics.

The Challenge

A mid-sized finance company with a growing customer base was struggling to keep up with increased call volumes and rising customer expectations. Their outdated reporting tools only provided delayed, static data, leaving managers unable to react quickly to operational challenges. Key performance indicators (KPIs) such as First Call Resolution (FCR) and Customer Satisfaction (CSAT) were below industry benchmarks, leading to dissatisfied customers and high agent turnover.

The Solution

The finance company implemented modern contact center software to overhaul its operations. Real-time dashboards replaced slow, manual reporting, giving managers immediate visibility into critical KPIs such as FCR, CSAT, and Average Handle Time (AHT). Advanced analytics revealed call drivers contributing to low FCR and high repeat call rates. AI-powered coaching tools flagged interactions that required supervisor review, enabling targeted feedback and faster agent development. Real-time adherence and utilization monitoring helped supervisors optimize workloads and reduce burnout. Predictive forecasting allowed the company to staff appropriately for peak periods, cutting wait times and lowering call abandonment rates. Integrated surveys captured customer feedback across channels, helping managers correlate NPS and CES with operational metrics.



The Results

Within six months of implementing the software:

- First Call Resolution increased from 70% to 82%, surpassing the industry benchmark.
- CSAT improved from 78% to 90%, signaling a significant boost in customer satisfaction.
- AHT decreased by 10%, enhancing efficiency without sacrificing quality.
- Call Abandonment Rate dropped from 6% to 4%, meeting best-practice standards.
- Agent Turnover declined by 12%, thanks to improved coaching, real-time support, and better workload management.

Supervisors reported higher confidence in managing their teams, and agents appreciated the timely, personalized feedback that supported their growth. Overall, the finance company transformed its contact center operations, delivering a more efficient and satisfying customer and staff experience.

Lessons Learned

- Real-time data drives action: Managers need instant visibility to respond proactively to service challenges.
- AI coaching builds agent confidence: Identifying calls that need attention accelerates agent development.
- Feedback loops close gaps: Tying customer feedback to operational KPIs pinpoints improvement opportunities.
- Modernization pays dividends: Adopting advanced software helps finance contact centers move from reactive management to proactive excellence—resulting in measurable gains in customer satisfaction and operational efficiency.

Conclusion

This example case study demonstrates what success can look like for contact center managers in the finance industry who choose to modernize their operations. Managers can transform performance, improve agent engagement, and deliver superior customer experiences by adopting real-time software tools and focusing on key KPIs.



 sales@ximasoftware.com

 ximasoftware.com

 US: +888.944.XIMA
US: (801) 930-1800
UK: +44 (0) 80000541227
APAC: +61 386168550