

## CLIENT SUCCESS STORY: TD BANK

Superior customer experience is one key reason why TD Bank is a leader in the industry and continues to grow its customer base. TD Bank's success stems from its ability to consistently deliver a superior customer experience while controlling costs. RightNow CX supports TD Bank's differentiated customer experience by delivering consistent, up-to-date information both internally and across their consumer channels.

### Results Include:

- Fast, consistent customer service delivered via web, email, and phone
- 55% reduction in email workloads
- Ability to reallocate the majority of contact center resources dedicated to email response
- Over 97% of emails are now answered within 24 hours, and over 50% are answered within 6 hours
- Scalable solution to handle the growth of TD Bank's customer base and footprint

TD Bank and more than 65 other banks and credit unions, including ABN AMRO, Bank of the West, First Republic Bank, and Navy Federal Credit Union use RightNow CX to deliver exceptional customer experiences across the web, social networks, and contact centers, all delivered via the cloud. They have the tools to provide an exceptional, consistent experience while reducing operating costs and providing opportunities to increase revenue.

## RIGHTNOW CX ASSISTS BANKS AND CREDIT UNIONS TO:

### Drive Revenue

- Increase revenue by understanding what customers are looking for and guiding them to the relevant products and services
- Improve cross-selling capabilities by presenting high-value cross-sell and upsell options along with a 360° view of the customers and their interactions
- Increase contact center sales capacity through reallocation of email agents

### Actual Results

- Increase online sales leads by 35–50% using contextual offers and determining user intent
- Improve online sales conversions by 20–40%

### Strengthen Relationships Through Improved Customer Care

- Empower agents with complete visibility into historical customer data and current interactions coupled with access to knowledge to help the customer
- Provide a single application for both outsourced and in-house contact center agents for a consistent set of knowledge
- Seamlessly support customers globally in 33 languages and dialects

### Actual Results

- Raise first-call resolution rate from 15–40%
- Increase Net Promoter Scores by 20–30%
- Decrease email handle time by 50%

### Reduce Costs

- Drive down cost per channel by delivering knowledge when it counts
- Improve agent productivity by leading consumer inquiries to the right channel

### Actual Results

- Decrease inbound email by 18–70%
- Reduce inbound calls by 10–30%
- Improve agent productivity by up to 20%

“RightNow promised that they would help us achieve our service goals, and they delivered. With RightNow, we provide consistent, compliance-verified information to the outside world via phone, email, and the web. As a result, TD Bank continues to provide consistently exceptional service across all communication channels with extraordinary resource-efficiency.”

—Mark Ellis, Senior Vice President of eCommerce, TD Bank

## RIGHTNOW WEB EXPERIENCE

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### Web and Mobile Self-Service

Empowers customers to quickly find answers to their questions online, 24 hours a day, without assistance

### Chat, Mobile Chat, and Co-Browse

Facilitates real-time, online interactions between your agents and customers visiting your website

### Intent Guide

Guides customers to open new accounts and add services through relevant, contextual offers

### Virtual Assistant

Drives conversion rates and reduces live assistance costs by enabling more personalized and natural conversations during the engagement

### Email Response Management

- Provides rapid, accurate responses to customer emails
- Leverages routing rules to choose the best-suited agent

## RIGHTNOW CONTACT CENTER EXPERIENCE

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### Dynamic Agent Desktop

Delivers great customer experiences consistently and efficiently across channels while improving agent productivity

### Phone and Multi-Channel Interaction Management

Streamlines customer communications with a unified view of all customer interactions—phone, email, web, chat, social media, or in person

### Multi-Channel Incident Management

Tracks inquiries across channels to make sure every customer receives a timely reply and avoids redundant use of staff time

## RIGHTNOW SOCIAL EXPERIENCE

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### CX for Facebook

Provides self-service, crowd-service, and agent-assisted service directly from a customer service tab on your Facebook page

### Cloud Monitor

- Tracks real-time discussions about your company and products occurring on the social web
- Takes steps to address issues and make relevant offers

### Support Community

Enables peer-to-peer support through discussion forums, Q&A, resource libraries, and more

## Innovation Community

- Makes customers part of your innovation processes
- Uses communities to identify new opportunities and refine ideas

## RIGHTNOW ENGAGE

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### Customer Surveys

Allows you to listen to your customers and take immediate action on feedback

### Reporting, Dashboards, and Data Warehouse

Tracks activity through more than 600 standard reports and dashboards, and advanced analytics capabilities such as data mart, trending, time-slice analyses, and predictive analytics to help you measure and respond to changing business conditions

## RIGHTNOW CX PLATFORM

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### PCI Compliance

Provides a hosting environment certified as PCI DSS Service Provider Level I, the highest level possible for service providers

### Embedded Knowledge Foundation

Easily captures the expertise of your most experienced agents and user-generated content and makes it available to others

### App Builder

Provides a complete suite of tools to rapidly configure, extend, and integrate customer experience apps on the RightNow CX cloud platform

### Mission-Critical SaaS

Enables the scalability, performance, and reliability required by mission-critical contact centers

### Enterprise Integration

Integrates RightNow with other systems, making customer knowledge available to your enterprise

### Pilots

Allows you to test drive RightNow and quickly learn how it can benefit your company. RightNow's innovative Pilot Program gives you the ability to use your own data to see immediate results.

## FOR MORE INFORMATION

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Please visit our website at <http://www.rightnow.com/financial>, or call us at 1-866-630-7669.