



## CLIENT SUCCESS STORY: TD BANK

Service is a key competitive differentiator in the banking industry. If customers don't like the way you treat them, they can easily take their money right down the street. That's why TD Bank works hard to maintain a strong corporate culture of service and responsiveness. The company—which has grown rapidly from \$2 billion to \$40 billion in assets—saw an opportunity to improve email service levels and provide customers with easily accessible answers to their banking questions. TD Bank also sought to improve the efficiency of its service operations across the board, maintain cost control and accomplish this all while its technology resources supported an aggressive acquisition strategy. TD Bank succeeded on all accounts with the help of RightNow's CX solution.

### Results

- 97% of emails are answered in 24 hours.
- 55% reduction in inbound emails.
- Ability to shift customer service resources to other more strategic projects.

▶ **To read the case study for TD Bank, please visit <http://www.rightnow.com/customers-td-banknorth.php>**

Over 125 financial services institutions such as American Express, Bank Group, Jackson Hewitt, Navy Federal Credit Union, and Western Union use RightNow CX, the multi-channel customer experience suite, to deliver great customer experiences across the web, contact center and social touchpoints. These frontlines of the business are where customers are won and lost every day.

From pre-sales research to post-sales service and social interactions in-between, RightNow gives companies the power to present accurate, consistent information, reach consumers with relevant and personalized campaigns, provide the highest quality support, gather and act on valuable feedback, and ensure positive customer experiences to drive repeat business.

### Improve Customer Care and Loyalty

- Deliver a single, seamless conversation with clients across all communication channels—phone, online, email, web, chat, social media, or in person.

- Provide more information and self-service tools to clients who want it.
- Immediate access to the information required to help each client.
- Gather feedback from customers on their experience and taking immediate action on negative feedback.
- Provide more information and self-service tools to customers who want it.
- Support outsourcers as well as in-house customer service agents—one application across all support organizations provides reporting consistency and operational simplicity.
- Deliver proactive customer support through monitoring and analysis of social media conversations.

### Increase Revenues

- Cross-sell and up-sell members/clients based on their interests.
- Provide critical information during online purchasing journey such as interest rates, terms and service charges.
- Increase online conversions through live chat and co-browse.
- Drive increased institution and online traffic through segmented email communications.

### Establish and Nurture Communities

- Leverage online customer communities to build brand, loyalty, and revenue.
- Tap into customer enthusiasm for ideation and innovation.
- Deliver proactive customer support by monitoring and joining conversations.
- Reduce support costs by allowing customers to help each other.
- Integrate the social experience with all other customer touchpoints.

### Increase Efficiency

- Reduce inbound email by 30 – 70%
- Reduce inbound calls by 10 – 30%
- Reduce phone call durations
- Reduce incident escalations
- Reduce new agent/staff training time

# RIGHTNOW FINANCIAL SERVICES

## RIGHTNOW WEB EXPERIENCE

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### Web Self-Service

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

### Chat and Co-Browse

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

### Email Response Management

Provide rapid, accurate responses to customer emails. Leverage routing rules to choose the best-suited agent.

### Web Experience Designer

Create a tailored and branded online service experience extending assistance to customers anywhere online.

## RIGHTNOW CONTACT CENTER EXPERIENCE

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### Intelligent Agent Desktop

Improve agent productivity with a single workspace and access to all customer details.

### Phone and Multi-Channel Interaction Management

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

### Multi-Channel Incident Management

Track inquiries across channels to make sure every customer receives a timely reply and avoid redundant use of staff time.

### Voice Self-Service

Enable common FAQs via the phone—without human intervention.

### Contact Center Experience Designer

Deliver consistent and accurate interactions regardless of whether agents are novice or experienced, in-house or outsourced, call center-based or remote with Configurable Workspaces, Contextual Workspaces, Agent Scripting, and Desktop Workflow.

## RIGHTNOW SOCIAL EXPERIENCE

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### Cloud Monitor

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

### Support Community

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

### Innovation Community

Make customers part of your innovation processes. Use communities to identify new opportunities and refine ideas.

### Social Experience Designer

Do-it-yourself online community platform tools you need to create the right social experience for your customers.

## RIGHTNOW ENGAGE

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### Customer Surveys

Listen to your customers and take immediate action on negative feedback.

### Email Marketing and Newsletters

Increase sales and loyalty with targeted email campaigns and newsletters.

### Opportunity Management

Full knowledge across the customer experience supports timely, relevant sales offers to meet customer needs.

### Reporting, Dashboards, and Data Warehouse

Provides 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

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

### Embedded Knowledge Foundation

Easily capture the expertise of your most experienced agents and user-generated content and make it available to others.

### Mission-Critical SaaS

Provides 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

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 [www.rightnow.com](http://www.rightnow.com) or give us a call for more information.

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