

Bank Appointment Scheduling

Ensuring the right staffing resources and knowledge workers are available, and in the right location, to service the customer's needs is essential to conducting business.



Address the "New Normal" staffing mandates



Meet the needs of the distributed workforce



Provide insights into resources



Bring together information from disparate siloes

Branches are closing down, either temporarily to address societal distancing and remote working challenges due to COVID-19 pandemic, or on-going in response to a changing industry. As banks pivot to the "New Normal" the workforce of a bank that engages with customers will not just reside at branches but also at home offices and remote locations. To cater for the diverse needs of customers, the right staff and resources need to be available at the right times and locations.

When branches are operating a strict booking policy it is essential that visits to the branch fulfil the entire need of the customer, reducing the likelihood for subsequent visits. Not all activities can be completed digitally, such as accessing a security deposit box.

- Resources can be tracked and assigned as required
- Reduces risk associated with manual processing of proof documents
- Enhances automated KYC and AML processes
- Expedites credit processes whilst providing insight into fraudulent activities
- Oversight is provided to all correspondence received, allowing the tracking of volumes and speed at which requests are dealt with

- Additional insight and overviews of the content can be provided to increase the efficiency during manual touch points
- Personally Identifiable Information (PII) can be flagged, and tracked, to ensure records management policies are adhered to upon completion of the correspondence request
- Notifications can be generated providing the customer with insight into the progress of their correspondence

OpenText Resource Scheduling for banks

Empower a distributed workforce: Ensure all employees have access to all the information required to complete their tasks and engagements with customers

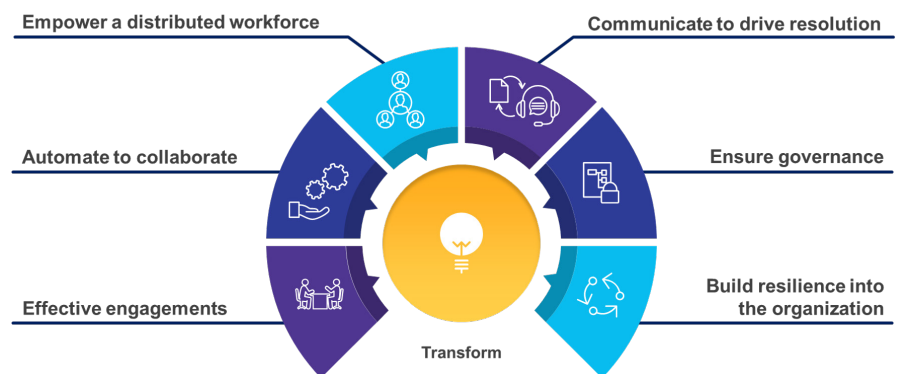
Automate to collaborate: Route customer queries to the relevant knowledge worker and allow collaboration for non-standard cases

Effective engagements: Guide customers through tailored engagements ensuring frictionless resolution, or progress, of queries

Communicate to drive resolution: Relevant personalized communication is required to build trust and guide customers through a process

Ensure governance: Protecting the information of customers and organizations becomes paramount when the workforce embraces remote work

Build resilience into the organization: Ensuring processes can be adapted in an agile manner is critical to address the shifting needs of customers and the industry



About OpenText

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