

Case Study:

A Fortune 500, wealth and investment company saves \$11.6M annually with consolidation and standardization

Challenge

- Multiple print vendors and limited standards contributing to high customer communication fulfillment costs
- Increasingly constrained and costly IT resources required for changes
- Lack of consistency in customer communications across lines of business
- No single source for call center agents to view customer communication and correspondence

Solution

- Standardized output and consolidated to a single print vendor
- Integrated separate systems into one platform enabling users to self-manage communication changes without IT assistance, on demand, at no cost
- Created new enterprise-wide communication design standards
- Leveraged data to drive messaging, tracking information, and detailed cost breakdown

Benefits

CX New brand standards with content management across lines of business: used by 1,200 call center agents and 75 back-office users in 10 globally dispersed locations

\$ Annual savings of \$11.6M due to IT and print cost reductions

✓ Detailed tracking, reconciliation, and cost reporting for 34M documents per year)



Client

Fortune 500, Wealth & Investment Company

Industry

Financial Services

Solution

EngageOne™ RapidCX

“EngageOne™ RapidCX allowed us to meet our True North objective to dramatically improve how we deliver both print and digital information, to enhance our documents and deliver communications using the channel chosen by our customers.”

- Sr. Executive, Fortune 500,
Wealth and Investment Company