CASE STUDY

FINANCIAL SERVICES LEADER IMPLEMENTS SOLUTION FOR AN IMPROVED EMPLOYEE EXPERIENCE WHILE DEEPENING CUSTOMER RELATIONSHIPS

Rivet Logic's implementation of a concierge tool using MongoDB and Crafter CMS enables leading global payments and technology company to deepen relationships with its loyalty members through a superior customer experience.

At a Glance

INDUSTRY
Financial Services

USE CASE
Data Analytics, Web Content Management

The new solution has created a much better environment for agents to effectively perform their daily tasks, while allowing the company to gain valuable insights to create the best possible experience for its loyalty reward members.

ORGANIZATION

Our client is a leading global payments and technology company that connects consumers, businesses, merchants, issuers and governments around the world. With over 10,000+ employees around the world, our client offers a variety of products, including 1) Payment Solutions – credit, debit, prepaid and commercial cards; 2) Digital Platform Solutions – mobile payment solutions, sending and receiving money; and 3) Value-added Services – loyalty and rewards, and advisor / concierge services.

CHALLENGE

One of the value-added benefits our client offers is a Concierge Service for its loyalty members, which acts like a personal assistant to help plan and book travel services, including airfare, lodging, restaurants, entertainment , and experiences. The team of concierge agents relied on a variety of resources for planning and booking these travel services – including internal sites for travel arrangements, external sites for events and restaurants such as Ticketmaster and OpenTable, manual searches and word of mouth referrals between fellow agents for additional recommendations, and Word documents for itinerary creation.

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This process was not only tedious and lacked efficiency, it also limited the agents from maximizing potential upselling opportunities. Our client needed a better tool and process for its team of concierge agents to search, share, and build/recommend relevant travel itineraries for its loyalty card customers that would leverage system intelligence and travel preferences based upon prior reservations as well as customer profiles . The goal is to create a better experience for the company, its agents and management, to ultimately improve relationships with its customers.

SOLUTION

The new solution had to be easy to use, with the ability to cater to a variety of permissions to manage and consume offers globally depending on the user's role – agent or administrator – and geographical location. The tool needed to:

1. Allow agents to quickly search and select offerings that are relevant to the customer's occasion and request leveraging intelligence derived from prior experiences.

2. Minimize the number of resources an agent must use to perform their daily tasks.

3. Maximize the upselling opportunities for agents by giving them easier access to complementary offerings.

4. Allow administrators the ability to quickly manage offerings so that agents are always up-to-date on new offers.

As a trusted implementation partner with a track record of success and expertise in their selected technologies, our client chose Rivet Logic to develop the concierge tool. Taking a phased approach, the first step was to implement a single platform to aggregate all offers, giving agents the ability to search, view, share and save offers while building out travel itineraries for the loyalty members. Once that was complete, Rivet Logic worked on enhancing the system with analytics and reporting functionality to track, measure and share data trends. This helped our client gain better insight into offer performance, such as the number of times an offer was saved and booked, its popularity, how multiple offers in a single location are being bundled into an itinerary, and more.

Rivet Logic's solution included MongoDB as the database to store the details of offers and offer bundles. With a rich and flexible data model, MongoDB has the ability to handle highly diverse data types, while also being flexible enough to evolve with future business requirements. To create the web application, Rivet Logic utilized Crafter CMS for its extensible platform, which is successfully deployed in other areas of the organization. Crafter Engine, a high-performance content delivery platform, is used to create and run the application, while Crafter Profile, offering user profile and account management capabilities, is used to support login and application preferences.

RESULTS

The new concierge solution has created a much better environment for the agents to effectively perform their daily tasks, while enabling collaboration across agents. It's also allowing the company to gain valuable insights to make continuous improvements to its travel offerings to create the best possible experience for its loyalty reward members. Through personalized dashboards displaying charts with the most pertinent information, agents can at a glance see their ranking, itineraries by status, top offers booked, and more.

Utilizing advanced search capabilities, agents now have the flexibility to filter results based on certain criteria, including destination, offer categories, occasion category and occasion type, allowing them to quickly build attractive itineraries that cater to each customer's unique needs. In addition, real-time search and offer sharing with customers while they're on the phone is not only delivering faster, instantaneous results, but also an improved customer experience.

Even more, the ability to link offers based on geographic proximity, occasion, and popularity allow agents to provide complementary recommendations to build a more comprehensive itinerary for each customer, while also increasing upsell opportunities to boost their volume.

Agents now also have the ability to create and manage their itineraries through an automated process. Whereas the previous manual process relied on Word documents, agents can now create new itineraries directly within the platform, add and remove offers in a "shopping cart" manner, share and track the status of each itinerary.

Lastly, integrated reporting capabilities provide valuable insight into offer performance and localized trends and habits. The new concierge solution has received tremendous positive feedback from its users. Looking forward, our client has plans to further enhance the system with additional features including suggestive search, more advanced reporting capabilities, and additional integration with external resources.