

SANTANDER: TRANSFORMING PERSONALIZED INTERACTIONS ACROSS FINANCIAL SERVICES



CUSTOMER PROFILE

Santander Bank is a leading global financial institution, serving millions of retail, corporate, and investment clients. With a focus on delivering exceptional client experiences, Santander sought to enhance its branch operations and event management processes while maintaining a high standard of personalized interactions.

CHALLENGE



Operational Efficiency

Branch staff struggled to balance ad hoc walk-ins, pre-scheduled appointments, and last-minute adjustments during peak hours.



Client Expectations

High-value clients required more tailored services, such as priority queuing and exclusive wealth management appointments.



Event Management

Popular financial education and advisory events experienced crowding and uneven attendance, leading to missed engagement opportunities.



Staff Optimization

Real-time adjustments to branch staffing and customer flows were difficult to achieve with existing systems.

THE SOLUTION

Santander Bank partnered with JRNI to implement its **In-Person Interaction Platform**, enabling the bank to offer seamless, tailored experiences to all clients while optimizing branch operations.

Key features implemented included:

- **Appointment Scheduling:** Allowing clients to easily book appointments for financial advisory sessions, wealth management consultations, and other high-value services.
- **Queue Management:** Managing walk-ins and VIP clients effectively by moving them to appointments or prioritizing service.
- **Event Coordination:** Streamlining registration, waitlists, and crowd control for financial literacy seminars and investment workshops.
- **Real-Time Staffing Optimization:** Leveraging real-time traffic data to adjust staffing dynamically based on client flow.



THE RESULTS

Increased Appointment Attendance

+20%

Simplified booking processes and real-time updates drove higher engagement and completion rates.

Reduction in Wait Times

15%

Efficient queue management reduced branch congestion, ensuring faster and more satisfying client experiences.

Increased Event Attendance

+30%

Optimized staffing schedules during high-demand periods, reducing customer wait times by 25%.

Only **JRNI** enables financial services and banks like yours to build and staff personalized customer journeys across appointments, local events and queuing using **a single connected platform**.