

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.



Event Management

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



Client Expectations

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



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**.