

Nassau Financial Group elevates customer experience with Talkdesk.



USE CASE

Service & Support

INTEGRATIONS

Financial Services
Experience Cloud

INDUSTRY

Financial Services
& Insurance

www.nfg.com

KEY METRICS

90s

reduction was observed in AHT.

4.5%

decrease was recorded in the transfer rate.

Nassau Financial Group is a dynamic, growth-focused financial services company dedicated to becoming the carrier of choice in the insurance industry. Founded in 2015, Nassau has rapidly expanded, with \$1.5 billion in total adjusted capital and \$24.3 billion in assets under management. The company specializes in selling annuity products and Medicare Supplement Insurance and has built its success on strategic acquisitions of various insurance and financial firms.

At Nassau, customer satisfaction is paramount. The company is committed to helping customers achieve their retirement goals through personalized, efficient, and seamless

experiences. Recognizing the importance of customer experience (CX), Nassau's vision is to make every interaction with customers as easy and efficient as possible. This vision drives them to continuously optimize their operations to meet evolving customer needs.

“Our mission at NFG is to work harder to be the insurance carrier of choice, and that starts with a seamless customer experience,” says Jared Selage, Technical Lead for Service Delivery. “Minimizing how long callers wait on hold or get transferred around are vital to making that happen.”

Navigating complexity in the contact center.

Nassau faced several challenges in providing a smooth customer experience, especially with their complex communication structure. The company serves a diverse customer base, including insurance agents and policyholders, across multiple departments. However, routing customers to the appropriate department and minimizing unnecessary transfers was a persistent issue.

Additionally, because Nassau's communication system had to meet the specific needs of various departments, they required a flexible solution capable of adapting to those unique requirements. The company's previous system struggled to provide this flexibility and efficiency.

In search of a more agile and efficient solution, Nassau Financial Group turned to Talkdesk. With Talkdesk's powerful, customizable features, Nassau saw an opportunity to address their immediate challenges and future-proof their customer service operations.

"We needed a platform that could not only streamline our call routing but also cater to the specific needs of each department," says Selage.

Upon adopting Talkdesk, Nassau immediately began utilizing the platform's advanced features to improve call routing and department-specific workflows. The ability to customize code tailored to individual departmental needs allowed the company to seamlessly integrate Talkdesk into their existing infrastructure.

Leading industry innovation in customer experience.

Nassau chose to implement Talkdesk with a phased approach, starting with basic voice services and call routing. Over time, the company expanded to leverage advanced Talkdesk features—including the [Talkdesk Financial Services Experience Cloud™](#) and [Talkdesk Autopilot™](#)—to transform the customer experience through [CXA](#), improve service delivery, and enhance overall customer satisfaction.

"With Talkdesk, we can finally provide the flexibility to interact with customers on their terms, whether they want to talk to an agent or use self-service options," says Kathleen Genier, AVP, Call Center Operations. "We're excited to see what we can achieve with Talkdesk AI, which will further enhance our ability to predict and respond to customer needs."

One of the first significant improvements was Talkdesk's ability to personalize customer interactions through intelligent call flows, powered by [Talkdesk Studio](#). Using Talkdesk Autopilot, Nassau was able to simplify complex coding tasks, and integrate machine learning and APIs with their enterprise data warehouse. This allowed the platform to identify the intent behind customer inquiries and route calls to the appropriate department with a high degree of accuracy.

Enhanced Flexibility for Dynamic Operations.

As a business closely tied to the stock market, Nassau needed a solution that could reflect the company's operational hours and handle changes to availability quickly. The company used Talkdesk's dynamic modules to address this need, building custom solutions that allowed departments to manage active hours, meeting schedules, and unplanned downtime.

For example, Nassau created a module to notify customers

One of the most significant benefits was the ability to reduce the number of customer transfers. Through Talkdesk, Nassau was able to streamline call routing, ensuring that each call reached the right department quickly, minimizing wait times and improving overall customer satisfaction.



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JARED SELAGE, TECHNICAL LEAD, SERVICE DELIVERY



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about business hour changes or holidays. They also built functionality to align the call center's availability with the New York Stock Exchange (NYSE) calendar, making it easier to adjust staffing and availability in response to market schedules. These improvements were made with minimal code management, thanks to Talkdesk's flexibility.

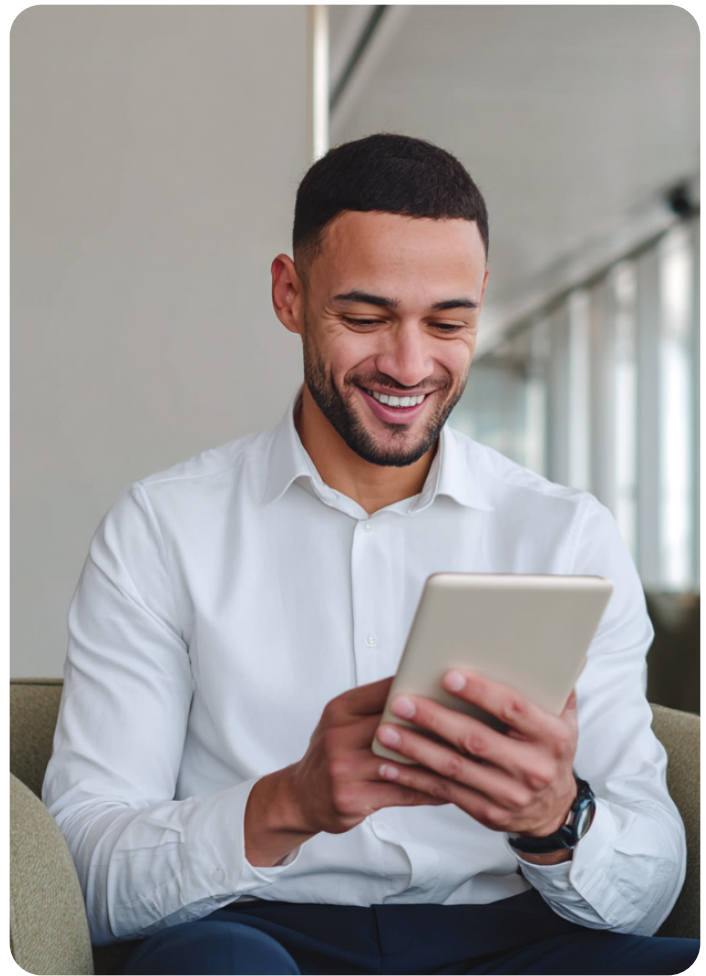
Impressive Results: Greater Efficiency & Satisfaction.

With Talkdesk fully integrated into their operations, Nassau Financial Group has made significant strides in enhancing their customer service capabilities. The company is already looking ahead to further optimizing the platform, particularly through the introduction of new self-service features. These capabilities will empower customers to resolve issues on their own, leading to an even more efficient and personalized experience.

"Talkdesk has been a game-changer for us," says Genier. "We're always looking for ways to improve our service, and Talkdesk is the key to unlocking even more value for our customers. As we move forward, we're excited to continue exploring the platform's capabilities to further elevate our customer experience."

Since adopting Talkdesk, Nassau has seen significant improvements across several key performance metrics:

- **Faster Call Routing:** Through integration with the data warehouse and improved call routing logic, Nassau now routes calls to the appropriate department with greater accuracy. As a result, the company's transfer rate has decreased by **4.5%**.
- **Faster Average Handle Time:** With additional data available on the agents' screens (including caller verification and account information), average talk time has decreased by **90 seconds** per call.
- **Higher Job Satisfaction:** Call reps have expressed increased job satisfaction, as the Talkdesk platform makes their workflows more efficient and customer interactions more seamless.
- **Increased Customer Satisfaction:** With faster, more accurate service, Nassau's **Net Promoter Scores (NPS)** and **Customer Satisfaction (CSAT)** scores have improved. The company has maintained a **4.9/5.0 rating on Trustpilot** since implementing Talkdesk, reflecting the positive customer experience they provide.



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A Vision for Continuous Improvement.

The success of the initial implementation is just the beginning for Nassau. The company is committed to continuously refining its use of Talkdesk to improve both customer and agent satisfaction. With the upcoming integration of Talkdesk AI, Nassau expects even greater improvements in call routing accuracy, personalization, and the overall efficiency of their customer service operations.

"We're only scratching the surface of what Talkdesk can do for us. As we continue to explore the platform's features, we're excited to see how it will drive even more value for both our customers and our team," says Genier.



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Through its partnership with Talkdesk, Nassau Financial Group has transformed its customer service operations, delivering a seamless, personalized, and efficient experience across multiple channels. The company's ability to quickly adapt to changing customer expectations and continuously improve its internal processes has not only enhanced customer satisfaction but also driven operational efficiency. With Talkdesk, Nassau is well-positioned to meet the evolving needs of its customers and continue providing high-quality service in the future.



Talkdesk® is leading a new era in customer experience with Customer Experience Automation (CXA)—a new category and platform designed to automate the full complexity of modern customer journeys. CXA replaces fragmented, manual workflows with multi-agent orchestration that drives speed, precision, and efficiency. Powered by the Talkdesk Data Cloud, AI agents act with real-time context to resolve issues and improve over time. Talkdesk helps organizations lower costs, improve outcomes, and modernize service—without a full rip-and-replace. Learn more at www.talkdesk.com.

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