



How Woodforest National Bank achieved a 16% FCR improvement and a 17% customer satisfaction increase with employee-centric AI

CUSTOMER STORY





About

- **Industry:** Financial Services
- **Company Size:** Enterprise
- **Use Case:** Customer Support

Woodforest National Bank, headquartered in Texas, is a leading provider of financial services through convenient branch locations within Walmart stores and Sam's Clubs.

With a commitment to exceptional customer service, Woodforest National Bank prioritizes the quality of their call center interactions.

How Woodforest National Bank achieved a 16% FCR improvement and a 17% customer satisfaction increase with employee-centric AI

The Problem

Woodforest National Bank's quality assurance (QA) team faced several challenges in maintaining efficient coaching processes for their contact center representatives:

- **Quality data Scattered Across Systems:** Quality data resided in multiple locations, making it difficult for supervisors and coaches to access a holistic view of agent performance.
- **Challenges with analyzing and understanding performance data:** Scattered data across multiple systems, time-consuming manual analysis, and a lack of real-time insights made it difficult to pinpoint areas for improvement, hindering targeted coaching and informed decision-making
- **Inconsistent, time-consuming coaching process:** Without a centralized system for logging coaching interactions, it was challenging to ensure consistency and track the effectiveness of coaching efforts.

The Opportunity

Woodforest National Bank recognized the need for a unified solution to centralize contact center data, enable supervisors, and enhance the impact of coaching. They partnered with AmplifAI to implement employee-centric AI that unified data, optimized coaching, and improved frontline performance.



The Results

16%

Improvement in First Call Resolution

\$1.4 Million

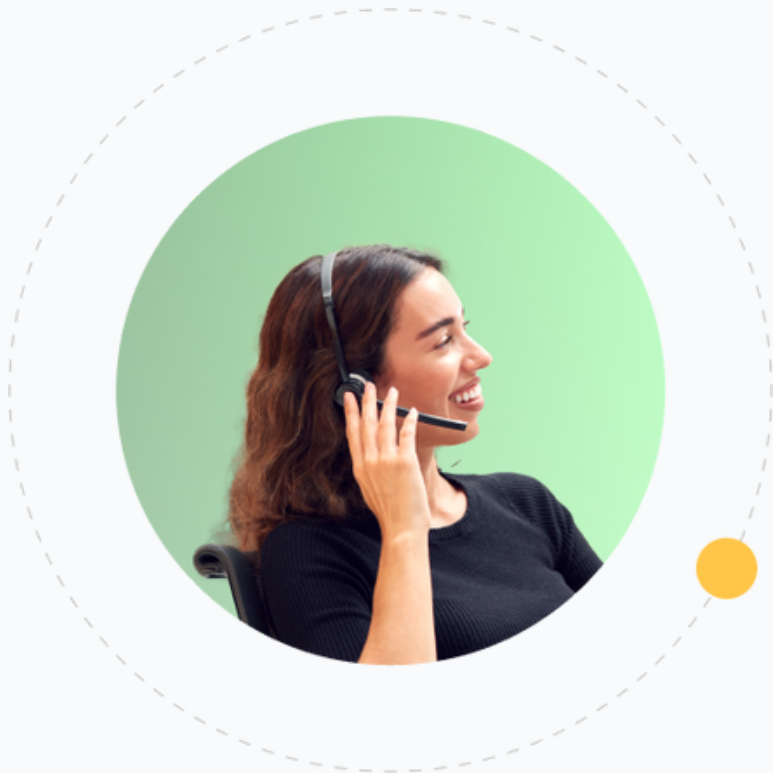
Annual savings from reduction in repeat calls

17%

Improvement in Customer Satisfaction

153%

Increase in Coachings Per Agent (Monthly)



The Solution

AmplifAI's platform provided Woodforest National Bank with a centralized hub for all their contact center data. This streamlined solution offered key benefits:

- **Data Consolidation:** The platform aggregated quality data from various sources into a single, unified location. Supervisors and coaches gained instant access to a comprehensive view of agent performance metrics.
- **Performance Transparency:** Agents and team leaders gained on-demand access to clear performance data and actions, fostering ownership over individual metrics and streamlining the identification of areas for improvement.
- **Standardized Coaching Process:** The platform facilitated the creation and logging of coaching sessions, ensuring a consistent approach to agent development.
- **AI-Driven Coaching (Next Best Coaching Action):** The solution analyzed agent performance and provided data-driven recommendations to team leaders. This included pinpointing specific goals to prioritize during coaching sessions as well as opportunities for both recognizing wins and addressing performance gaps. This empowered team leaders to make the best use of their limited coaching time.
- **Team Leader Coaching Effectiveness:** By tracking the percentage of coaching sessions leading to measurable agent improvement, the platform helped isolate team leader effectiveness from the overall raw performance of their team. This provided valuable insights into where to target team leader development efforts for maximum impact.



The Results

By implementing the centralized performance enablement platform, Woodforest National Bank achieved significant improvements in their coaching processes and key quality metrics:

- **Boosted First Call Resolution (FCR):** FCR rates rose by 16%, climbing from 54.46 to 63.04. This indicates enhanced agent ability to resolve customer inquiries effectively during the first interaction.
- **Reduced Repeat Calls & Annual Savings:** By improving their First Call Resolution (FCR) rate, Woodforest Bank experienced a significant reduction in repeat calls - over 487,000 less calls for the year. This translated to cost savings of over \$1,462,800 for the organization.
- **Improved Customer Satisfaction:** Customer satisfaction with agents improved by 17%, going from 62.26 to 72.73. This demonstrates the positive impact of targeted coaching on overall customer experience.
- **Increased Coaching Frequency & Impact:** Coaching sessions per agent increased by 153%, from 1.9 per month to 4.8 per month. This enhanced focus on agent development translated into tangible results.
- **Exceeded Coaching Targets:** Woodforest National Bank initially aimed for 1.0 coaching session per agent monthly. Based on the insights provided by the platform and the observed benefits of coaching, the target was increased to 4.0 coaching sessions per agent.

