

# Medium Enterprise Financial Services Company

## Introduction

This case study of a medium enterprise financial services company is based on a November 2021 survey of Talkdesk customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.



“Talkdesk Omnichannel has been very effective for connecting with customers.”

## Challenges

The business challenges that led the profiled company to evaluate and ultimately select Talkdesk:

- The business challenges they were experiencing with their call/contact center software that led them to implement Talkdesk:
  - Poor voice quality
  - Poor value for money
  - Poor support/service

## Use Case

The key features and functionalities of Talkdesk that the surveyed company uses:

- The Talkdesk capabilities that were most important to them when evaluating competitive or alternative solutions:
  - Call quality
  - Value for investment
  - Ease of customization & administration
  - Integrations with other technologies (e.g., Salesforce, Microsoft, ServiceNow, etc.)
  - Product feature set/functionality
  - AI and automation capabilities
  - Capability to scale
  - Support/service

## Results

The surveyed company achieved the following results with Talkdesk:

- Level of improvement on the following since using Talkdesk:
  - Agent satisfaction or productivity: 25% to 49%
  - Handle/resolution improvements: 25% to 49%
- They improved customer satisfaction by 10% since implementing Talkdesk.
- How using Talkdesk impacts their day-to-day experience as a CX professional:
  - With Talkdesk, they have more information to make better decisions: agree
  - With Talkdesk, they’re able to help their customers more effectively: agree
  - With Talkdesk, they’re able to help their customers more efficiently: agree
  - With Talkdesk, they can connect with customers anytime, anywhere: agree

### Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:  
**Medium Enterprise**

Industry:  
**Financial Services**

### About Talkdesk

Talkdesk is a global customer experience leader for customer-obsessed companies. Our contact center solution provides a better way for businesses and customers to engage with one another. Our speed of innovation and global footprint reflect our commitment to ensure businesses everywhere can deliver better customer experiences through any channel, resulting in higher customer satisfaction, cost savings and profitability. Talkdesk CX Cloud is an end-to-end customer experience solution that combines enterprise scale with consumer simplicity. Over 1,800 innovative companies around the world, including IBM, Acxiom, Trivago, and Fujitsu partner with Talkdesk to deliver a better way to great customer experience.

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