

UNBLU CASE STUDIES

# PostFinance: The road to conversational maturity with a long-term Unblu customer

unblu

PostFinance+



## Context

PostFinance is one of the largest retail financial institutions in Switzerland. Owned by the Swiss government, PostFinance's employee base of 3,655 individuals from 46 nations serve over 2.4 million customers.

Unblu and PostFinance have an extensive ongoing relationship, with the collaboration beginning in 2016. In that time, the two organizations have grown together over the years, overcoming shared challenges to ensure enhanced conversational support.

The collaboration began with the deployment of embedded Co-Browsing to support clients in the e-banking environment. Later, the company decided to replace the emailing system with a more secure alternative that merges all inbound requests into Unblu. Today, the collaboration continues, with new initiatives to harness Unblu's Video & Voice capabilities for distinct use cases.

## Main Goals



Introduce new channels to serve and advise clients



Shut down the email legacy system



Enhance digital journeys on mobile devices

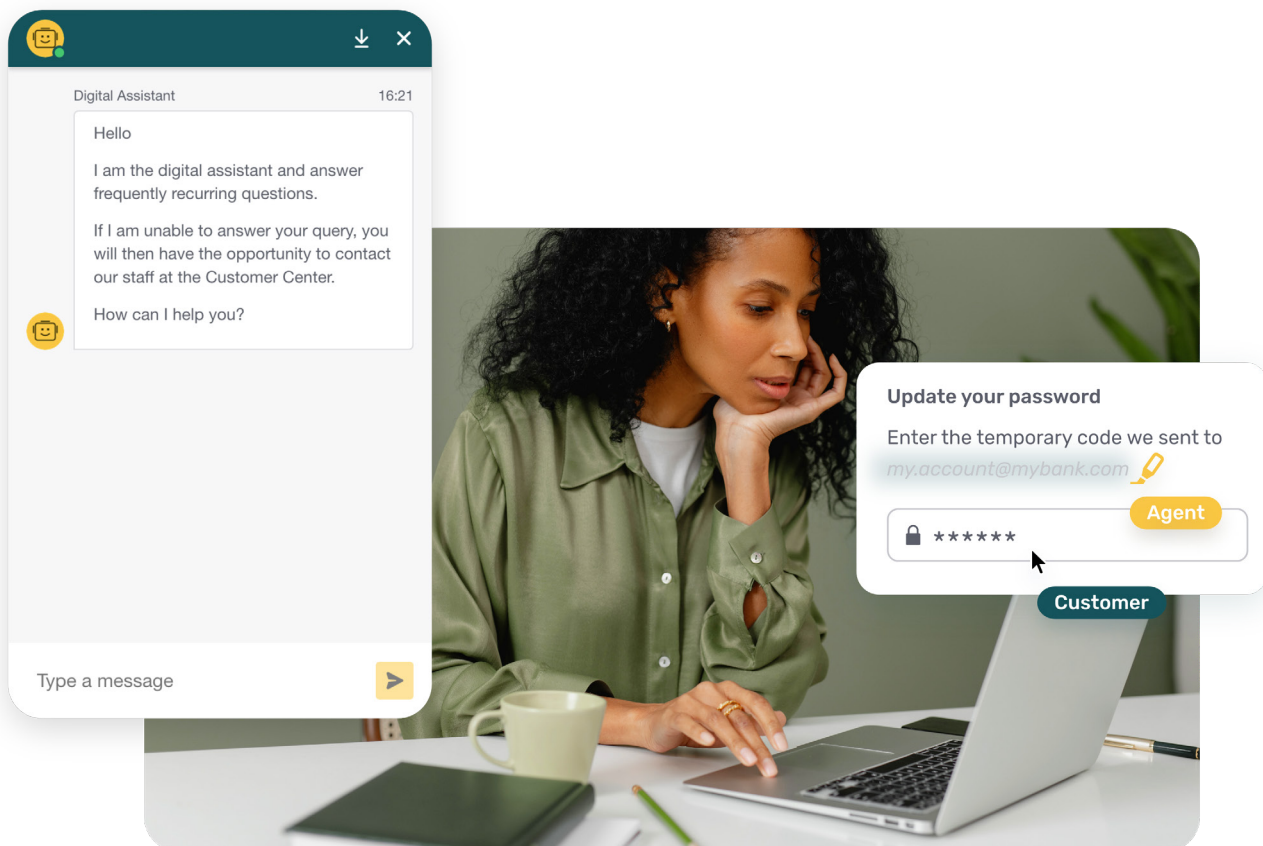




## Initial collaboration: Chat channels and Co-Browsing

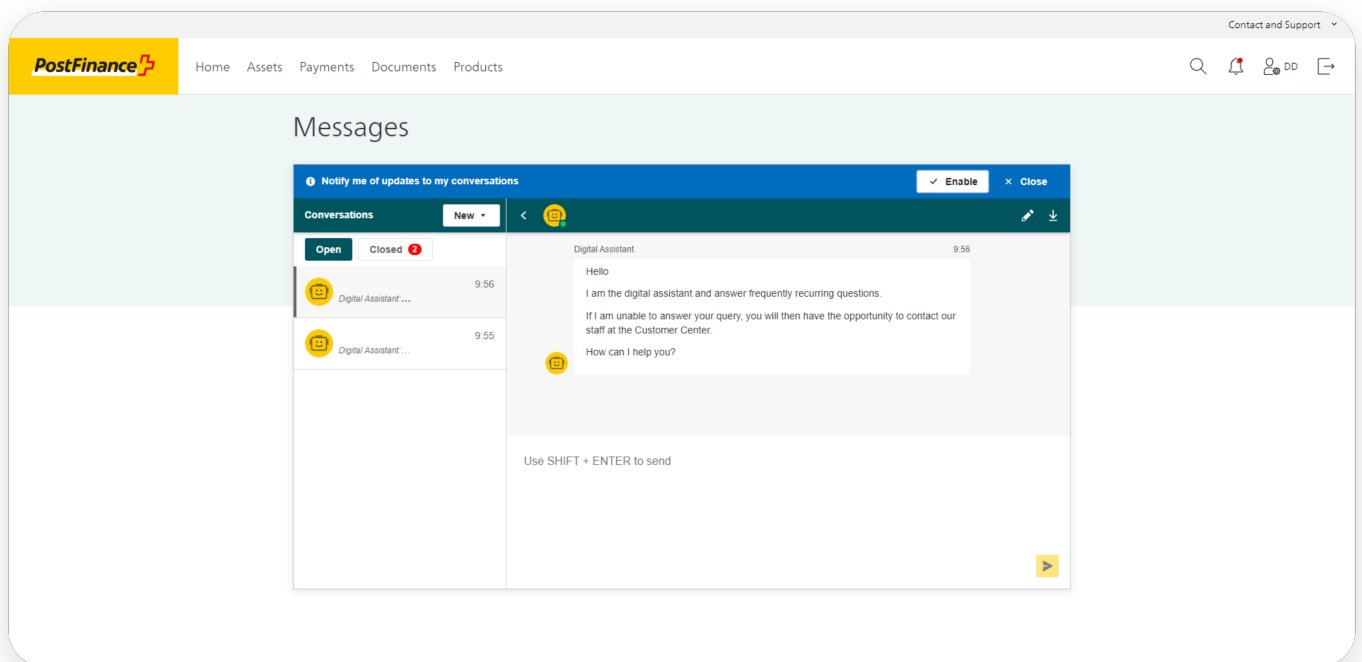
The Unblu-PostFinance collaboration began with the goal of offsetting phone calls and providing alternative support channels.

To this end, the proven combination of Live Chat and embedded Co-Browsing was introduced to support clients on the public website in combination with the PostFinance Chatbot.



## Continuing the collaboration: Phasing out emailing

At a later stage, Unblu worked side by side with PostFinance and other key technology providers to successfully handle all incoming inquiries, whether they originate through an Unblu channel or not – including secure email from e-finance.



This allowed PostFinance to:

1

Handle all inquiries through one main system

2

Merge all inbound client facing teams into a single organization.

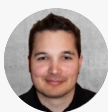
3

Turn off the legacy secure emailing system which lacked certain capabilities.

## Results achieved so far:



*“We have been using Unblu for more than 7 years and today we have 1,500 agents enabled with Unblu for about 20,000 conversations every month.”*



**Mike Koller**  
SME Sales & Operational  
Excellence at PostFinance

Agents can answer either phone calls or Unblu-powered Secure Mails (Unblu). By using a media-blending system, they get different kinds of conversations depending on the flow of requests.

For example: The morning is more phone-heavy and so the system prioritizes phone calls. The afternoon, however, is lighter on calls – so chat channels are prioritized.

## Channel insights



9min 50sec AHT

87%



10min 30sec AHT

13%

### Customer insights: Chat performance

PostFinance finds that most customers use the chat or email channels when they:

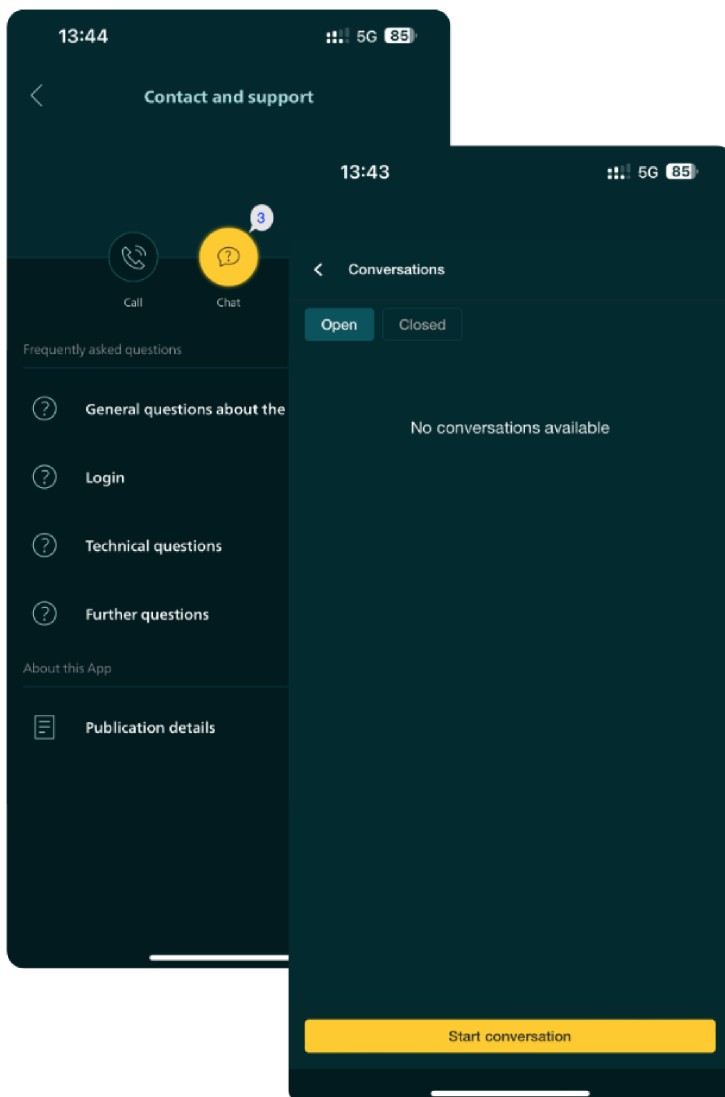
- ✓ Need to order something,
- ✓ Have an inquiry about a transaction.
- ✓ Want to send a document to Postfinance

PostFinance’s mastery of text channels has allowed them to achieve a stable AHT across both text and voice channels. This has been achieved in part thanks to their diligent implementation and use of canned or predefined responses, which have up to 16 different placeholders such as variables or markdown menus.

## Continuing the journey: Strengthening the relationship

The relationship between Unblu and PostFinance is in a stage of continual growth and improvement. Insigitating change in such a large organization is

an incremental process – but PostFinance is taking active steps to further integrate Unblu into their technological fabric.



### Co-Apping

The Post Finance team is putting a stronger focus on enhancing their mobile experience. For this reason, they are looking to enhance Secure Messaging capabilities with the ability to “natively” Co-Browse their mobile application. This will further empower their advisors to reach more efficient resolutions and provide better advice.

### Video & Voice Consultations

The team is also looking to add Video & Voice consultancy to their existing appointment scheduling service (available in eFinance behind e-banking authentication). The aim is to complement the existing options which are “branch consultation” and “phone consultation,” while also increasing the percentage of remote consultations.

## Want to find out more?

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If you have any questions,  
please email us at [sales@unblu.com](mailto:sales@unblu.com)

