

# One Step Ahead in Enhancing the Customer Experience



## A Major Retail Bank Gains Greater Visibility and Control Over Contact Center Operations and CX

One of Canada's largest banks has grown with Cyara, evolving from performance and stress testing to proactive problem detection. The chosen solution, Cyara Pulse, keeps watch on customer experience (CX), automatically monitoring interactions from both the agent and customer perspective, mimicking their behavior, and providing real-time visibility of CX performance. Working together, engineering and customer engagement teams have integrated Cyara Pulse into a holistic, unified dashboard that enables all contact center operations to be managed from a single screen.

The bank's custom-built dashboard affords a real-time view into the contact center customer experience, closing the gaps on CX visibility. The dashboard brings health check and performance data from Pulse into full view, alongside other point solutions' insights, through the use of REST APIs.

The bank's current Director of DevOps and Engineering Transformation is responsible for driving change in all facets of development, with "a big emphasis on reducing toil through automation."

**Industry:** Retail Banking

**Location:** Montreal, Canada

**Company Size:** 88,000 full- and part-time employees

**Challenges:**

- Unable to get a unified view of call center operations
- Supporting 6,000 agents across four major contact centers and numerous satellites
- Agents assisting with everyday banking to complex financial products and collections
- Most agents working remotely during the pandemic

**Solutions:**

- Cyara Pulse



**"We can now see in one place exactly what's happening across all facets of our call centers – from agent behavior to call volumes, CX health monitoring and even technical monitoring."**

—Director of DevOps and Engineering Transformation,  
Leading Canadian Bank

“I’m focused on finding friction in the development process and remove it through automation.”

## Deep Experience with Cyara

Already very familiar with the essential role Cyara can play in achieving his goal, this Director of DevOps and Engineering Transformation has worked with Cyara since 2011, when the bank was in the process of shifting from a Nortel call center solution to Voice over Internet Protocol (VoIP). “Back then, VoIP was relatively new for large call centers; we started working to make sure the new environment we were deploying would scale to the highest loads we anticipated would be put on it.

“Our main focus was on performance and stress testing of the environment,” they continue. “We did frequent load testing of the production environment, and each one of those tests found a new soft spot that we had to address.”

**“In the early days, Cyara was instrumental in helping us identify any weaknesses in the new system we were deploying.”**

— Director of DevOps and Engineering Transformation, Leading Canadian Bank

“It was great in that we were able to find those problems early on and resolve them, hardening the solution in such a way that it would prevent any soft spot from becoming a real client impact issue in the future.”

## Following the Customer Journey

The Senior Manager Modernization & Resiliency has been with the bank since 2006. Their experience in application development has been invaluable in helping drive the customer experience in their call center technology. They are currently accountable for lifecycle management of the bank’s virtual assistant and IVR assistant. These telephonic helpers are “the front door to our organization,” they said.

“We receive and route tens of millions of customer interactions each year.”

In 2011, during the migration to VoIP, they began automating all IVR and routing strategy test cases. “This allowed our teams to provide a level of test coverage that was never before possible when we were doing things manually,” this Senior Manager says. “Cyara gave us significantly greater confidence in the changes being rolled out into production, allowing us to go-live with these changes faster than ever before.”

## BENEFITS ACHIEVED



**6,000 agents supported, most working remotely**



**More than 12 applications integrated with Cyara Pulse**



**Holistic view into call center operations**

**“Cyara helped us find and isolate problems impacting our customer that we never knew we had.”**

—Sr. Manager Modernization & Resiliency



Over time, this financial institution grew to use the entire Cyara platform, evolving from load testing, regression testing and application performance monitoring to live CX monitoring. “In recent years we have been focusing heavily on monitoring. But while we can instrument all of our systems pretty well, we knew that there were issues out there that we could not simply detect. We started working with Cyara to create system monitoring campaigns, to reproduce what was happening from a CX perspective in a technology-agnostic way,” the Senior Manager said.

In fact, their network infrastructure contained numerous upstream carrier components that were outside of the team’s line of sight. “There were multiple areas that we had no information about. Cyara monitoring allowed us to provide the end-to-end coverage to follow the exact journey a customer would take,” he said.

## Real-time CX monitoring

Their Director of DevOps and Engineering Transformation expands on how they use Cyara Pulse for real-time monitoring. “From an operations perspective, one of the bigger challenges we had was that each of our core systems that drive the call center had its own dashboard, its own view of what’s happening in that system. Some were better than others, some had more detail than others, but ultimately it was a real challenge to understand what was truly happening at any given point.”

At times their team would need to log into six or seven of these tools trying to “stitch it all together” to get a clear picture of what was happening. “It’s difficult for us to troubleshoot incidents that were hard to understand from both business and technology perspectives.”

## Consolidating data in a single store

The bank addressed this fragmented view by consolidating all data from the various applications into a single data store. From there, they used Cyara to build out multi-source displays that provide a centralized, holistic view. We can now see exactly what’s happening in our call centers, in one place. We can monitor every facet, from agent behavior to call volumes and CX health. We can even get a quick overview of what’s happening technically.”

**“Cyara offers a very powerful set of APIs that we can do a lot with.”**

—Director of DevOps and Engineering Transformation,  
Leading Canadian Bank

In building this display, they discovered that “we can pull in a lot of data, all kinds of data, from the call center environment and bring it into our data stores, thanks to Cyara’s APIs. It shows all of our CX campaigns running in real-time, and whether any are failing. I can go straight into failing calls to see what is happening and drill into details.”

## Improving CX outcomes

Cyara Pulse is featured prominently on the bank’s dashboard, displaying multiple types of information. At a glance, they can see if any test cases failed more than once, sorted by occurrences over the last seven days. “The numbers may indicate if we have a system problem, or that may have to tweak our test case in some way. Pulse gives us a sense of failure trends and provides only the fail details of each test case. This really helps with analyzing each test case, pointing to exactly what we need to look into.”

In the background, they use the volumes of data collected to feed multiple machine learning (ML) models, which “are learning all of our normal trends; an anomaly in call volume, for example, will trigger an alert.” Their Director of DevOps explains. “So, between Cyara Pulse and the rest of dashboard, and the predictive power of the ML jobs running in the background, we know about issues much earlier, including some issues that we never knew we had.”

The team’s superior awareness allows it to advise their business leaders of important issues and make any operational changes necessary to manage an outage as it’s taking place. “From a CX perspective, our ability to react and resolve issues sooner has had a very powerful positive impact.”

**“The scope of monitoring is key. Any CX monitoring should cover the end-to-end customer journey, including making sure the IVR takes the call, as well as periodic functionality testing of the self-serve capability and the routing logic for customer simulation.”**

—Senior Manager Modernization & Resiliency

Since there is no ‘one size fits all’ approach to CX monitoring, their Senior Manager emphasizes the importance of fine-tuning the process on an ongoing, iterative basis. “Our future plans include staying one step ahead in customer experience management,” he says.

They plan to explore how they can use a failed call’s test case as an indicator of an issue they already know how to resolve and implement self-healing to address it. “Imagine that Pulse finds an issue and it kicks off a job in the background that automatically resolves the problem, even before anyone’s aware that it took place,” the Senior Manager says. “There will be a very powerful automated process in the background, mitigating any client impact.”

Their Director of DevOps concludes, “From the QA side of things we plan to explore the Cyara API capability more. We want to tie Cyara into our automated pipeline, so when we deploy an application, we will automatically call the Cyara test. There’s a lot more we can do to mature our automated approach to application development, and we’ll rely on Cyara to help us do it.”

## Customer Smiles. Delivered at Scale.

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