INSTANT CASE STUDY

Presence-aware Real-time Customer Service Through IBM Lotus Sametime

The Customer: A Global Financial Services Provider

The customer is one of the world's largest financial services institutions, serving more than 50 million individual and institutional clients in the United States and abroad. For over a century, this company has helped clients both grow and protect their wealth with information, advice, and choice on a broad range of asset management, insurance, securities, and employment solutions.

The Customer's Challenge: Connect with Clients by Extending Sametime to the Web and with Plug-ins

The customer decided to improve service by adding real-time access to their customer service professionals. Such a web chat application would provide their Group Insurance clients with the option to seek immediate, online help and thereby simplify and accelerate their enrollment process.

With IBM Lotus Sametime already in widespread use, the customer decided to meet this challenge by extending their Sametime environment with Instant Queue Manager from Instant Technologies.

Instant Solution: Instant Queue Manager

Instant Queue Manager adds the benefits of presence awareness and real-time access to helpful experts to help desk and customer service operations.

The process begins when a client logs into the customer's extranet site. The combination of a customized applet, an STLinks client, and a Sametime plug-in automatically and securely grabs the client's key data from a CRM database and displays it to the customer service professional manning the chat queue—no additional prompting for identification is needed.

"Our customer service professionals can then push web pages to the client; they can seamlessly launch instant meetings with all the advantages of Sametime web conferencing; or they can invite our subject matter experts into conversations," says the customer's System Architect. "Behind the scenes, all interactions are automatically logged and archived for auditing and employee performance reviews."

Instant Queue Manager has increased efficiency and improved productivity in the customer service team, and it has virtually eliminated client frustration with the enrollment process.

"Instant Queue Manager has proven to be an instant winner for us and for our clients," concludes the customer's System Architect. "Now we are planning to add queues for our internal help desk operations to improve tech support for our own employees."

About Instant Technologies
Instant Technologies specializes in developing innovative, enterprise-class compliance and productivity solutions for IBM Lotus Sametime and Microsoft Office Communications Server, including IM archiving, IM queue management, persistent chat rooms, IM bot development, buddy list administration, and more. Instant Technologies is a Lotus Advanced Business Partner and a Microsoft Registered Partner headquartered in Durham, NH.