



BREAKING DOWN SILOS IN CUSTOMER MANAGEMENT

The ideal all-around view of your customer for delivering optimal customer service with low-code, no-code automation



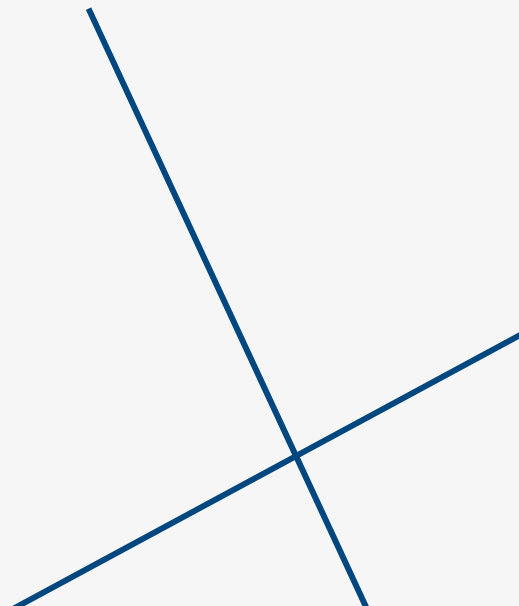
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42% of customer service agents said they can't resolve a customer's issue because of incomplete or inaccessible information.

- Forrester Research





Introducing Low-code Automation into the equation

Since its initial development, low-code developers have created flexible design spaces that convert into tailored applications made easily understood by business representatives.

A true winning low-code platform provides for a superior customer experience alongside a sleek and modern UX.

Additionally, any good omnichannel customer service solution operates at peak efficiency through the employment of visual modeling, drag-and-drop integration, and mobile enablement.

A Demand for Simplicity

As access to digital tools and technologies continues to grow, people demand more efficiency using their time.

A customer's interaction with a customer service team is a risky and often tedious process for companies that may not be equipped to meet the demands of active online users.

For virtually any company, it is a massive opportunity, as well as a privilege, to form a loyal customer base.





The Cost of Failing to Meet Modern Demands

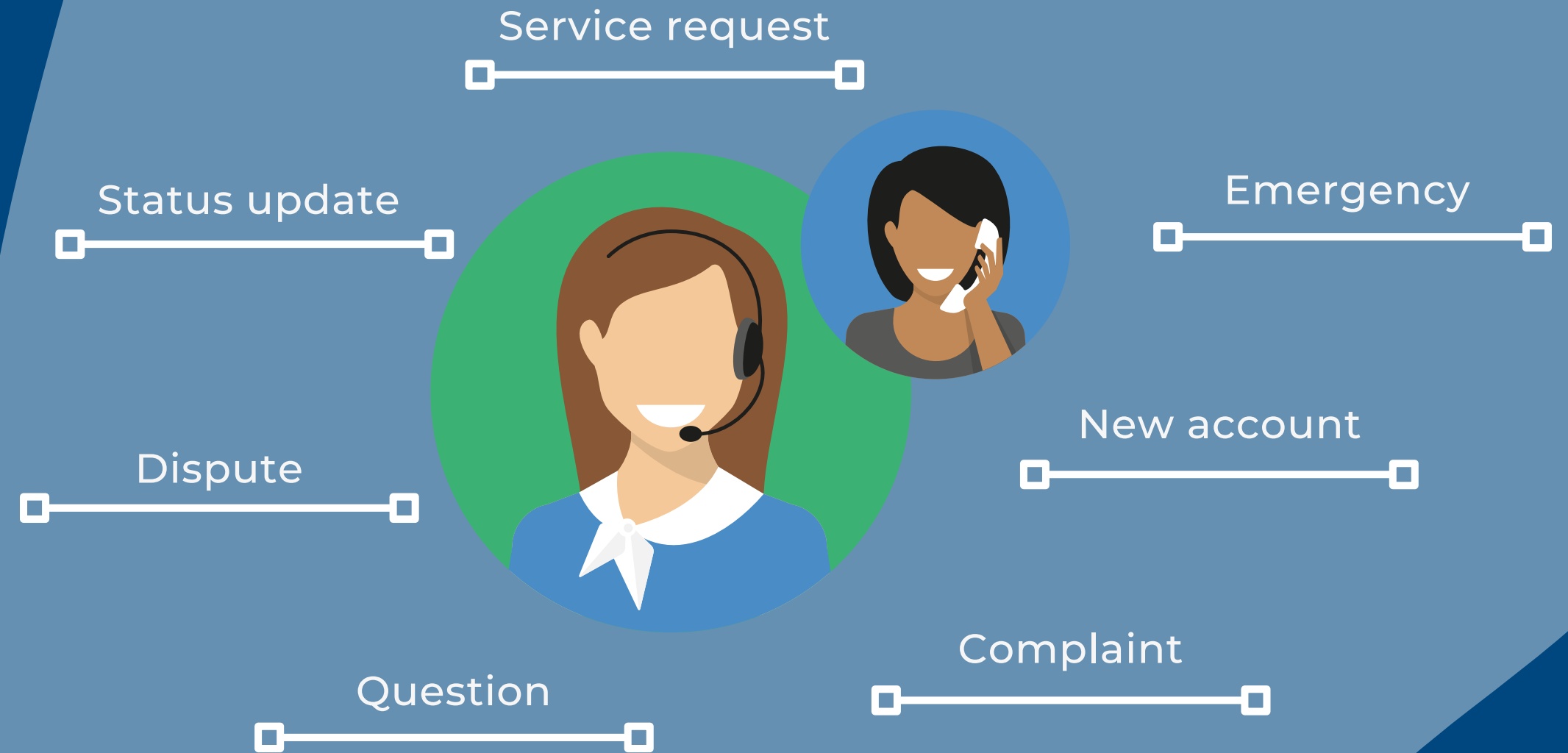
According to the Oracle, a whopping **89%** of consumers have switched to a company's competitor due to customers' complaints





The need to solve this issue is one of the most pressing concerns for any modern business, regardless of its size or stature.

Eccentex ServiceJourney is a customer service solution that provides a full 360-degree view of a customer's journey from end-to-end across all types of channels—from phone to text to web-driven through low-code automation.



Why understanding Customer Journey mapping is key?

A customer journey entails every detail regarding a customer's experiences from the start of their interaction with a company until their needs are resolved.

Customer journeys can be long or short and can touch multiple areas of access and channels while putting a customer in touch with customer service, salespeople, technical support, and more.





Registering for an online loan or sitting through a system troubleshooting more than often leaves a customer feeling frustrated, disappointed, and even lost in the process.

Some of these steps require days – or weeks – of repeated interactions or inbound touchpoints.

Eccentex provides customer service reps the ability to access all relevant data regarding a customer within a single platform to operate at peak efficiency and ultimately satisfy a loyal customer base.



The **real** journey



Tech savvy farmer

Wants to apply for a Farm Equipment Loan

Back-and-forth engagement

Multiple calls, chats, and emails while applying

His credit is not easily accessible

Other systems need to be involved taking time and bogging down the process

Portal, snail mail, signatures

More back-and-forth, review docs in the portal, sign contracts

The ideal journey



Tech savvy farmer

Wants to apply for a Farm Equipment Loan



Goes to the bank's website

Fills out a form and chats with an agent



Instant pre-qualification

Fills out a form and chats with an agent



Signs docs and receives money

Electronically signs the docs and gets an instant transfer

Optimal Means of Customer Data Profiling

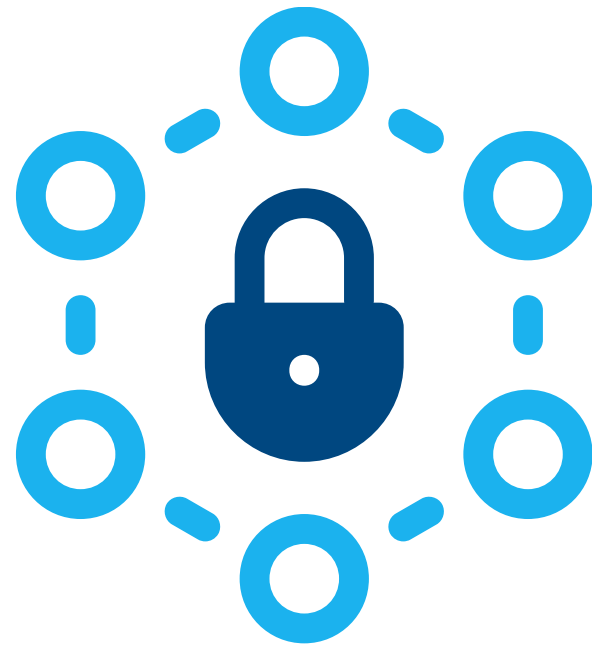
By employing low-code and no-code automation alongside omnichannel configuration within a company's database, modern customers will begin to notice their otherwise complex journeys simplified before their eyes.



Customer requests are easily addressed by self-service tools and upgraded workflow automation, leaving agents in charge of handling all complexities throughout the journey.



Customer data



**Personalized omnichannel
experience**

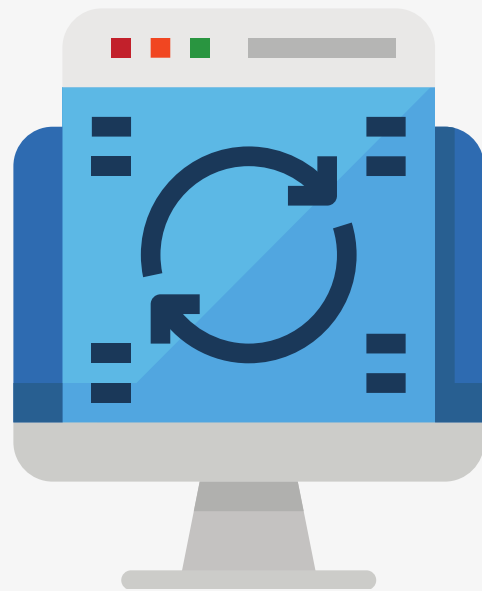


Trusted customer relationship

The Defects of Siloed Information

One of the main factors preventing agents from making the customer's journey simple is siloed information. Why?

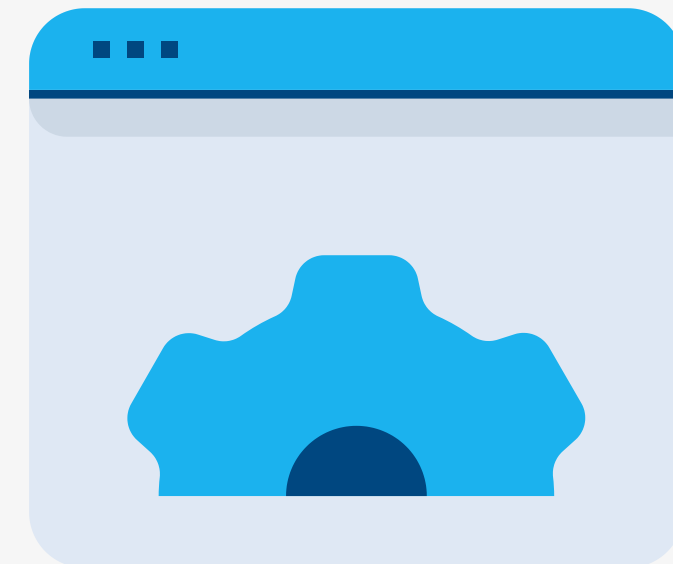
If customer service agents fail to resolve the problem due to a lack of information, they will lose their customers for good.



Employees lose time tracking down the latest status of a request



Customer data hides inside legacy apps, Excel files and emails



IT struggles to update systems without breaking other ones

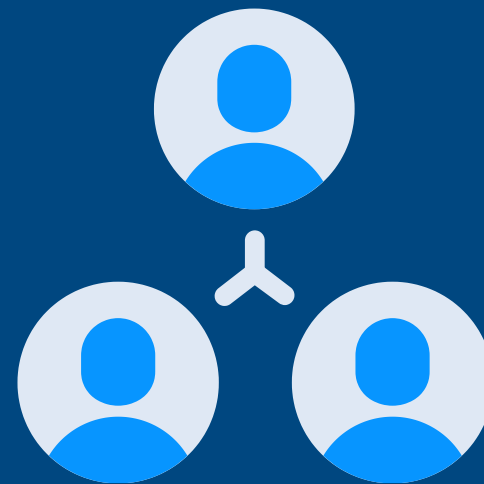


Introducing a Personalized Customer Experience

A critical aspect of ServiceJourney is its provision of a true omnichannel experience, one that lies in an agent's ability to track all journeys the customer may be on clearly. This is made possible by tracking customers' journeys across multiple departments while directly surfacing data with the agent in real-time.



Case management tracks journeys end-to-end, orchestrating work between the front, middle, and back-office



Customer360 shows agents a unified picture of the customer across business units and channels



Low-code allows business to continuously adapt to new business needs and customer expectations



By breaking down silos, ServiceJourney provides a complete view of the customer.

The screenshot displays the 'ACME Customer Service App' interface for a customer named Mr. Pat Thompson. The interface is divided into several sections:

- Customer Detail:** Shows Mr. Pat Thompson's profile, including his email (pat@email.com), phone numbers, address (3640 Sepulveda Blvd, Los Angeles, CA 90230, USA), and a credit score of 687 (GOOD). It also lists 'Gold Member' status and offers such as 'Fee protection service', 'Auto loan (new credit score)', 'Add a family member to the account', 'Eligible for a balance transfer', and 'Order new checks'.
- Case History:** A list of cases with their status and outcomes. For example, 'Excessive Fees Complaint' (CASE-2019-850) is 'Closed Fees reduced', and 'BMW Auto Loan' (CASE-2019-546) is 'Closed Loan denied - low credit score'.
- Engagement Journey:** A timeline showing customer service interactions. It includes 'Personas matched' (WARNING | Potential Complaint) and 'Outcomes achieved' (SALES | Credit Score Increased, Closed - Customer Satisfied).
- Case Journey:** A detailed view of the current case, showing milestones like 'Initial Assessment of Complaint' (Completed), 'Send Acknowledgement' (Completed), and 'Investigation' (Completed). It also notes tasks like 'Ad-hoc Task' (Created) for the compliance team.
- Overview Table:** A table showing account balance, credit limit, and last payment.

Account Balance	Credit Limit	Last Payment
\$8,433.29	\$20,000.00	\$256.89
Oct 21, 2019	Payment	\$256.89
Sep 21, 2019	Payment	\$256.89
Aug 21, 2019	Payment	\$256.89
- Current Products:** A list of accounts including MasterCard Credit Card, Checking, Equipment Loan, Visa Credit Card, and Savings Account.



Eliminate the need to click between multiple systems.
Connect to enterprise data sources and surface the most relevant information.

The screenshot displays the eccentex Customer Service App interface for a customer named Mr. Pat Thompson. The interface is divided into several sections:

- Customer Detail:** Shows Mr. Pat Thompson's profile, including his email (pat@email.com), phone numbers, address (3640 Sepulveda Blvd, Los Angeles, CA 90230 USA), and a credit score of 687 (GOOD).
- Suggestions:** Offers actions like "OFFER: Fee protection service", "OFFER: Auto loan (new credit score)", "Add a family member to the account", "Eligible for a balance transfer", and "Order new checks".
- Customer Info:** A navigation bar with tabs for Customer Info, All Cases (11), Work Activity (0 hours), Documents (3), Tasks (2), Journeys, Notes (3), and All References.
- Case List:** A list of cases including "Excessive Fees Complaint" (CASE-2019-850), "Excessive Fees Complaint" (CASE-2019-604), "Account Complaint" (CASE-2019-603), "BMW Auto Loan" (CASE-2019-546), and "Auto Loan for Wife" (CASE-2019-025).
- Engagement Journey:** A timeline showing customer service interactions from Dec 23, 2019, 09:31 AM, with outcomes like "WARNING | Potential Complaint", "SALES | Credit Score Increased", and "Closed - Customer Satisfied".
- Case Journey:** A detailed view of a case journey with milestones such as "Initial Assessment of Complaint", "Send Acknowledgement", "In Progress", "Investigation", and "Investigation Data Collection".
- Customer Account Overview:** A table showing account balance, credit limit, and payment history.
- Current Products:** A list of accounts including MasterCard Credit Card, Checking, Equipment Loan, Visa Credit Card, and Savings Account.

Account Balance	Credit Limit	Last Payment
\$8,433.29	\$20,000.00	\$256.89
Oct 21, 2019	Payment	\$256.89
Sep 21, 2019	Payment	\$256.89
Aug 21, 2019	Payment	\$256.89

Accounts	Product Type
061315-00003	MasterCard Credit Card
061515-00003	Checking
063423-00001	Equipment Loan
VISA 071216-00024	Visa Credit Card
071217-00005	Savings Account



Agents often rely on “tribal knowledge” to know which system they need to pull up to coordinate a new request. The product specialists and developers at Eccentex have orchestrated a way for all systems to be kept in a single place, saving agents valuable time.

The screenshot displays the Eccentex Customer Service App interface for a customer named Mr. Pat Thompson. The interface includes a navigation bar with 'Home', 'Customer', and 'Pat Thompson' tabs. Below the navigation bar, there are buttons for 'Wrap Up' and 'Add Task'. The 'Customer Detail' section shows the customer's name, contact information, and a 'Gold Member' status with a score of 687. The 'Suggestions' section offers options like 'OFFER: Fee protection service' and 'OFFER: Auto loan (new credit score)'. The 'Case History' section lists various cases such as 'Excessive Fees Complaint' and 'Account Complaint'. The 'Engagement Journey' section shows a timeline of customer service interactions. The 'Case Journey' section provides a detailed view of the current case, including milestones and tasks. A blue circle highlights the 'Create Case' form on the right side of the screen, which includes fields for 'Type', 'Sub-Type', 'Requested Amount', 'Current Income', and 'Account'. The form also features a 'Submit' button and an 'Alert' notification: 'ALERT: holidays may impact store hours'.



Customers may be calling regarding multiple needs at once or reference previous ones. Several cases clearly track customers' past and present journeys so that agents can quickly comply and provide updates directly to them in real-time.

The screenshot displays the 'eccentex ACME Customer Service App' interface. At the top, there are navigation tabs for 'Home', 'Customer', and 'Pat Thompson', along with a 'Search Cases' field. Below this, there are buttons for 'Wrap Up' and 'Add Task'. The main section is titled 'Customer Detail' and features a profile for 'Mr. Pat Thompson' with contact information (pat@email.com, +1 (949) 235-9009, +1 (310) 499-7060) and address (3640 Sepulveda Blvd, Los Angeles, CA 90230, USA). A 'Gold Member' badge is visible. To the right of the profile are several action buttons: 'Add a family member to the account', 'Eligible for a balance transfer', and 'Order new checks'. Below the profile, there are tabs for 'Customer Info', 'All Cases (11)', 'Work Activity (0 hours)', 'Documents (3)', and 'Tasks (2)'. The 'All Cases' tab is active, showing a list of cases with icons for 'Excessive Fees Complaint', 'Account Complaint', 'BMW Auto Loan', and 'Auto Loan for Wife'. Each case has a corresponding action button, such as 'Initial Assessment of Complaint' or 'Document Collection & Verification'. On the right side of the interface, there is a 'Create Case' form with fields for 'Type' (Account Management), 'Sub-Type' (Credit Line Increase), 'Requested Amount' (\$5,000.00), and 'Current Income' (\$100,000.00). Below the form is an 'Overview' section with a table showing account balance, credit limit, and last payment. The table has columns for 'Account Balance', 'Credit Limit', and 'Last Payment'. The data rows show: Account Balance: \$8,433.29; Credit Limit: \$20,000.00; Last Payment: \$256.89. The last payment row is broken down by date: Oct 21, 2019 (Payment: \$256.89), Sep 21, 2019 (Payment: \$256.89), and Aug 21, 2019 (Payment: \$256.89). At the bottom, there is a 'Current Products' section listing various accounts like MasterCard Credit Card, Checking, Equipment Loan, Visa Credit Card, and Savings Account. A large blue circle highlights the 'All Cases' tab and the list of cases.



Eccentex ServiceJourney's Customer360 view provides the ability to create more personal, proactive customer experiences based on a customer's data, journeys, and interactions.

The screenshot displays the Eccentex Customer360 view for Mr. Pat Thompson, a Gold Member with a credit score of 687. The interface includes the following sections:

- Customer Detail:** Shows contact information (pat@email.com, phone numbers), address (3640 Sepulveda Blvd., Los Angeles, CA 90230, USA), and a credit score of 687 (GOOD).
- Suggestions:** A blue circle highlights this section, which offers proactive recommendations such as "OFFER: Fee protection service", "OFFER: Auto loan (new credit score)", "Add a family member to the account", "Eligible for a balance transfer", and "Order new checks".
- Case History:** Lists various cases including "Excessive Fees Complaint" and "BMW Auto Loan", with status indicators like "Called agent", "Credit check", and "Closed No action".
- Engagement Journey:** A timeline showing customer service interactions, including "New Service", "Contact Us", and "Call Customer Service".
- Case Journey:** A detailed view of a specific case, "Loan denied - low credit score", showing milestones such as "Initial Assessment of Complaint", "Send Acknowledgement", "Investigation", and "Task: Ad-hoc Task".
- Current Products:** Lists active accounts including MasterCard Credit Card, Checking, Equipment Loan, Visa Credit Card, and Savings Account.

**IDENTIFY
STAKEHOLDERS
RESOLVE A CASE**

The People

TO

01

**WHAT CAN
BE
AUTOMATED**

The Plan

02

**4P'S OF SUCCESSFUL AUTOMATED
CASE MANAGEMENT**

WHERE IS THE DATA

The Picture

03

**IDEAL JOURNEY
TO RESOLUTION**

The Process

04



ServiceJourney Success - 4P Metrics

YEARLY

**20
Million**

cases resolved

YEARLY

**200+
million**

tasks completed

YEARLY

**35
million**

emails automated



About us

Eccentex delivers software for customer service, customer journey automation, and back-office automation. Eccentex's ServiceJourney solution empowers people to rapidly deploy, extend, and alter applications to meet optimal and strategic business requirements.

Over its history, Eccentex has delivered award-winning capabilities in case management and operational CRM powered by automation and form management to help the world's leading brands achieve breakthrough results.

Eccentex empowers you to engage, automate, and resolve customer issues better than ever before with a single platform.

For more on Eccentex's customer service solutions, [visit our page.](#)



Thank you

We look forward to
working with you!

eccentex.com

