



Amazon  
**Connect**

Contact center optimization  
for **Financial Services**





## Why are financial institutions transforming their contact centers?

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The Financial Services industry has relied on contact centers for decades—but traditional solutions aren't keeping up with customer expectations for instant, personal engagement. Consumers across retail banking, insurance, and wealth management expect more personalized advice from call center agents and admit that they would buy more products if they received personalized offers over the phone.

In addition to confronting changing customer demands, financial institutions face significant expenditures for traditional contact centers, which often involve multiple third-party vendors with complex licensing models.

With **Amazon Connect**, Financial Services organizations can improve their customer engagement while reducing costs and simplifying their contact center technology stack.



## What is Amazon Connect?

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Amazon Connect is a self-service, cloud-based contact center service that enables Financial Services companies to deliver improved customer service at a lower cost and in a pay-as-you-use model.

Non-technical users can manage customer service agents, track performance metrics, and design workflows for incoming calls without specialized skills. And Amazon Connect easily integrates with other AWS services such as Amazon Transcribe and Amazon Comprehend allowing users to leverage machine learning and analytics capabilities.

There are no up-front payments, no long-term commitments, and there is no infrastructure to manage. Amazon Connect customers only pay for the minutes they consume while servicing their customers, plus any associated telephony services.

## Why did we build Amazon Connect?

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**Amazon Connect** harnesses the same contact center technology that 70,000 Amazon customer service associates use in 32 countries, powering millions of customer interactions.

To deliver exceptional customer experiences, Amazon needed a contact center solution that was reliable, simple to manage, open, and could scale to meet surges in demand.

However, Amazon found that traditional contact center solutions couldn't meet its needs. Using its experience running an enterprise-scale customer service organization, Amazon built its own easy-to-use system that enables customer service agents to focus their attention on the customer.

Amazon Web Services (AWS) commercialized that cutting-edge service and now provides it to customers broadly to use as their scalable contact center solution.

# How can Amazon Connect support Financial Services?



With **Amazon Connect**, financial institutions can:

- **Transform** contact centers from transactional channels **into growth channels**
- Improve customer experiences to **build brand loyalty** and reduce churn
- Enable **real-time event processing** and workflow triggers to drive preferred behaviors across contact center representatives
- **Capture and identify signals** to generate greater customer intimacy

# Financial Services organizations are already using **Amazon Connect**

Organizations across Financial Services market segments—including retail banking, wealth management, insurance, payments, and others—can use Amazon Connect. In fact, a number of AWS customers are already taking advantage of the service to enhance their contact-center operations.

Businesses of any size can use Amazon Connect to receive and process customer calls. And because Amazon Connect is cloud-based, customer service agents can be based anywhere with an internet connection.

“ It’s a matter of *speed, agility, and meeting customers’ quickly changing needs*—**Amazon Connect** lets us use the latest technology to enable innovative digital services that help us meet customer and employee expectations faster than ever. ”

- **Gill Haus**, SVP, CIO Retail and Direct Bank, **Capital One**

“ With the seamless integration between **Amazon Connect and Salesforce**, *we’re unleashing the power of technology to customize the agent experience through data*. We’re improving agent productivity and allowing the agents to focus on customers, not their tools, to provide the best possible customer experience. ”

- **Loren Lacy**, Group Product Manager, Customer Experience Technology, **Intuit Inc.**

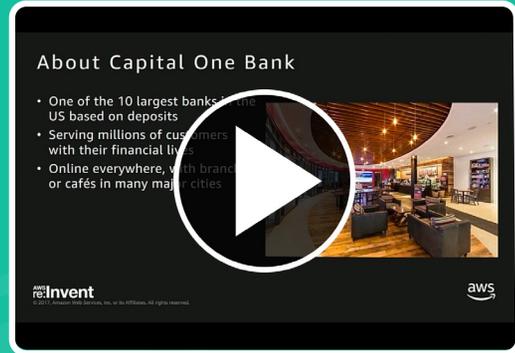


**Capital One**, a top 10 US bank, wanted to transform its customer contact center—the same way it has been transforming other aspects of its business. The bank wanted a faster, more personalized, and cost-effective way to serve its customers' needs.

Capital One decided to **replace its call center** with Amazon Connect, including direct banking and fraud operations. The bank went live with Amazon Connect in less than five months, reducing costs while customizing experiences for consumers and employees alike.

# re:Invent 2017

## Why Capital One chose Amazon Connect





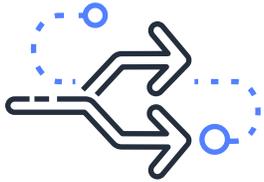
**Intuit**, a financial and tax preparation software company, needed to move beyond the expensive up front investments and infrastructure management challenges that its legacy customer contact solution imposed. Intuit chose Amazon Connect for its agile, scalable, and flexible contact center platform.

By using Amazon Connect, Intuit can easily scale to meet peak seasonal needs. In addition, other AI and ML solutions on AWS such as **Amazon Transcribe**, **Amazon Translate**, and **Amazon Comprehend** can capture and analyze customer experience to enable proactive customer engagement and continuous improvement.



# Key features of Amazon Connect

It takes only minutes to set up an **Amazon Connect contact center**. Through the AWS Management Console, users can easily configure a contact center using a self-service graphical interface.



## Skills-based routing

**Amazon Connect** ensures customers are sent to the right agents based on availabilities and appropriate skill sets to efficiently resolve issues. Managers can also set up dynamic business rules that expand and contract with the pool of available agents.



## Dynamic and personal contact flows

Non-technical users can use the **Contact Flow Editor** to create customer interactions, or “contact flows.” Then, using customer data with Amazon Connect metrics, users can anticipate customer needs and deliver answers to questions before they are even asked.



## Natural language chatbots using Amazon Lex

Business users can build natural language contact flows using **Amazon Lex**, an AI service that has the same automatic speech recognition technology and natural language understanding that powers **Amazon Alexa**.

# Key features of Amazon Connect



## Outbound calling

Amazon Connect enables programmatic calls, using the **outbound contact API**. Calls can be scheduled for automated reminders, and can be triggered to send automated notification calls in response to events, such as possible credit card fraud, or in anticipation of insurance claims.



## High-quality audio and recording

The Amazon Connect softphone delivers high-quality sound over the internet, is resistant to packet loss, and provides 8kHz audio to ensure a high-quality experience. Amazon Connect also comes with integrated call recording for agent performance assessment.



## Real-time and historic metrics

Amazon Connect provides a visual dashboard with customizable real-time and historical metrics reports. Managers can make data-driven decisions to increase agent productivity, reduce customer wait times, and gather insights to identify long-term trends in customer issues and overall operational performance.

# Benefits of using Amazon Connect



## Enterprise scale

With Amazon Connect, **there is no infrastructure to deploy or manage**, allowing firms to immediately run a contact center at enterprise scale. Tens of thousands of agents can quickly be onboarded in response to business cycles and then scaled down without seat licensing concerns or minimum commitments.



## Pay as you go

As an **on-demand service**, Amazon Connect usage is billed by the minute. There is no minimum monthly fee. Customers are charged based on the number of minutes used to engage with end customers, at the specified per-minute rate, plus associated telephony charges. Pricing is not based on capacity, agent seats, or maintenance.



## Reliable

Amazon Connect stays available by using multiple Availability Zones in an **AWS Region**, to provide fault tolerance if there is a server failure or Availability Zone outage. Amazon Connect uses multiple, redundant paths to telecom carriers to ensure that calls can continue to be established if there is a failure or circuit issue. Software updates are performed regularly, and there are no scheduled outages.

# Benefits of using Amazon Connect

## Open platform

Amazon Connect is an open platform, which allows integrations with AWS services as well as third-party systems such as CRM solutions and anti-fraud software. For example, **Amazon S3** can store call recordings, which **Amazon Transcribe** can convert to text based on channels. **Amazon Comprehend** can then run sentiment analysis of the transcripts. AWS analytics services such as **Amazon Athena** can analyze contact data in seconds, using standard SQL queries. And **AWS Lambda** serverless technology can serve to trigger workflows and provide task-based prompts to help customer service representatives adapt to customer needs.

Financial institutions can also work with AWS Consulting Partners and Technology Partners as they leverage Amazon Connect—organizations such as Aria Solutions, Deloitte, VoiceBase, and ServiceNow are transforming contact centers with many AWS customers today.



Amazon S3



Amazon Comprehend



Amazon Transcribe

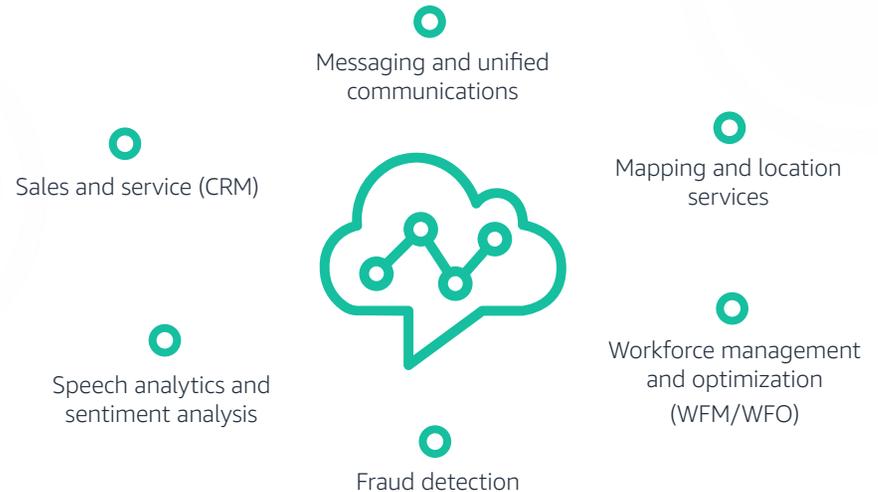


Amazon Athena



AWS Lambda

Common **Amazon Connect integrations** include:



# Get started with Amazon Connect

**Amazon Connect** is self-service so financial institutions can try before they buy. Simply log in to the **AWS Management Console** and set up an **Amazon Connect instance**. Amazon Connect is also part of the **AWS Free Tier**. Visit the **Amazon Connect pricing website** to learn about the free trial, and read more about how to set up Amazon Connect in the **user guide**.

Amazon Connect is certified as Payment Card Industry Data Security Standard (PCI DSS) compliant. Customers who use AWS products and services to store, process, or transmit cardholder data can rely on AWS technology infrastructure as they manage their own PCI DSS compliance certification.

Every organization's contact center solution will ultimately depend on its specific customers, its existing capabilities, and its existing technology environment. To discuss Amazon Connect in detail, or to ask questions, don't hesitate to reach out to your AWS account manager.

For additional materials, including Amazon Connect demo videos, please visit <https://aws.amazon.com/connect/>

Or visit the Amazon Connect **Frequently Asked Questions page** to learn more: <https://aws.amazon.com/connect/faqs/>



**Amazon Connect** currently supports the following eight languages:

English	Brazilian	German
Spanish	Portuguese	Simplified Chinese
French	Korean	Japanese

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Users see a localized view when accessing the Amazon Connect management console and Amazon Connect contact center instances.