

Increase QA oversight and reduce QA costs

Major Retail and Commercial Bank – UK

Major UK Retail and Commercial Bank increases QA oversight while reducing QA costs

A major UK retail and commercial bank conducting approximately 5,000 mortgage conversations each month needed to find a way to record face-to-face client-adviser conversations and analyse these at scale alongside the conversations recorded by their telephony provider.

The bank was aware they had an oversight gap in their face-to-face discussions and wanted to be able to proactively identify trends and inherent risks in the frontline of the business to mitigate the risk of consumer harm before it occurred.



Recordsure solution

Recordsure provided the bank with our full ConversationReviewAI suite to enable them to gain full oversight of all mortgage conversations and create a more efficient and effective QA process.

The solution was seamlessly integrated with existing telephony and video banking recordings, giving the client the ability to record, analyse and review all mortgage advice conversations across the breadth of their communication methods.



Capture

Advisers use the Capture app to securely record face-to-face meetings. The recordings are automatically uploaded to our Portal, and analysed by our AI models alongside the calls ingested from the telephony and video banking recordings to provide complete oversight.



Assure

Assure risk scores and scales the cases, with a user-verified human-AI agreement rate of 95%, highlighting the cases most in need of human review based on the Assure score output.



Classify

Classify segments mortgage conversations into colour-coded QA review checklist topics. QA teams use this to complete their reviews more methodically and efficiently, and in half the time.

Benefits

- Oversight of mortgage sales increased from <5% to 100%
- QA review time reduced by over 50%
- Improved advice standards and reduction in number of complaints
- Reduce QA and Compliance costs and generate substantial longer-term savings

Since 2018

Time with Recordsure

5,000

Total conversations
per month

Approx. 60,000

Total conversations
per year

411

Users