Recordsure

Enhanced QA oversight and reporting for Business Banking

Major Tier 1 Bank – UK

Major UK Tier 1 Bank's Business Banking division centralises QA process to improve monitoring and reporting

A UK Tier 1 Bank needed to improve quality assurance oversight for their Business Banking division by capturing and reviewing client-advisor conversations taking place in person or via video calls. The bank wanted to be able to review these conversations centrally, without deploying supervisors for in-person observations, so the reviews could be fed into the bank's central quality assurance processes, but without an added resource burden on the QA operations.

Recordsure solution

Recordsure provided the bank with our Capture and Classify modules so advisers can securely record their conversations, and central QA teams can use the recordings for their reviews.

All business banking conversations between the bank's clients and advisers that focus on Account Opening (including Current Accounts, Overdrafts, Savings, Credit Cards and Loans) are now securely recorded and uploaded to our web-based portal, which provides QA teams with quick and easy central access to these conversations and removes the need for regular in-person observations.

Capture

Advisers use the Recordsure Capture app for iPhone and Windows to record in-branch face-to-face conversations and remote VOIP conversations in a variety of live environments, which are then securely uploaded to the Recordsure portal.

Portal

Our secure Portal provides central access to 100% of recorded conversations alongside interactive and customisable MI to help identify individual and thematic trends. The data is exported from the portal via API to feed into central quality assurance reporting.

Classify

Classify provides reviewers with an immediate visual check of whether the adviser covered everything they should have during the conversation and enables reviewers to work more methodically and efficiently through their reviews by providing them with the ability to easily navigate to relevant sections of the call.

These efficiencies offset the resource burden of increased reviews that the new recordings created for the QA team.

Benefits

- Cost savings as a result of reduction in travel and other expenses generated by in-person observations
- Central record of, and access to, conversations where there was previously no oversight enabling proactive identification of potential issues
- Improved advice standards and reduction in number of complaints
- Increase in number of cases to QA as a result of recording offset by review process efficiencies created by using Classify

Since 2021

Time with Recordsure

6,500

Business Banking conversations per year

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