

BankMobile Optimizes CX and Cuts Costs with Ubiquity

BankMobile partnered with Ubiquity to streamline service and reduce costs. Ubiquity redesigned IVR, revamped training, and implemented global delivery—resulting in better CX, 18% higher first-call resolution, and over \$20M saved.

Challenge

BankMobile needed to simplify service flows and reduce costs while maintaining high satisfaction among college-age banking customers.

Solution

Ubiquity redesigned IVR, enhanced training, and introduced a multi-shore delivery model to increase FCR and NPS while cutting costs.

Key Actions:

- Performed comprehensive analysis of customer service flows to identify inefficiencies and opportunities for simplification.
- Redesigned IVR system with improved routing and self-service options for faster issue resolution.
- Developed training modules for the top 10 call types, enabling agents to meet key performance metrics.
- Implemented InTouch® for real-time call monitoring and performance tracking aligned to BankMobile goals.
- Launched global operational model (onshore, nearshore, offshore) for optimized cost, language, and service alignment.

Results

Results showed stronger customer engagement and significant savings.

- ☆ Increased first-call resolution by 18%, improving operational efficiency and customer satisfaction.
- ☆ Reduced overall call volume by 37% through smarter routing and self-service enhancements.
- ☆ Boosted Net Promoter Score by 46 points, showing stronger customer loyalty.
- ☆ Saved over \$20 million in operational costs since the partnership began in 2014.



In my 40 years of banking, Ubiquity is among the best partners I've had.
—Warren Taylor, EVP, BankMobile

37%

Reduction in total call volume



Increase in first call resolution

BankMobile's long-term collaboration with Ubiquity continues to deliver exceptional results in CX and operational efficiency, reinforcing their mission of creating 'Customers for Life.'