TAZI

A $600M Financial Institution's Journey to Understanding Voice of Customer (VoC) Across Multiple Channels

Customer Communications Topic, Sentiment and Trends Detection

How a $600M financial services company gained insights into customer communications topic, sentiment and trends in an automated and reproducible manner, at scale, by leveraging TAZI's Generative AI Voice of Customer Solution.

Challenge

The Customer Support and Engagement team had at least five (5) tools that provided topic and sentiment analysis (i.e. survey, email, and social tools) but they all did it differently and only based on the data they housed, so the team couldn't use these tools to determine the priority of efforts for improving customer experience. Instead, they wanted to understand the Voice of Customer holistically, across all their channels because only then they could prioritize effectively. They decided to start with two (2) channels that represented customers who probably didn't come to their call center: website and mobile app Contact Us forms.

Note: Business Analysts on the team tried building this solution manually but they realized that it would take too long and the solution couldn't be scaled to other channels, so they would end up with another "one off" solution to maintain.

Solution

Using the TAZI's Voice of Customer Solution the customer had an initial solution tailored to their business, processing unstructured data from emails and web app, in just two (2) days. The raw data did not include the ground truth sentiment, or topic labels. The description of sentiment and topics was provided to the TAZI VoC Solution utilizing the TAZI GenAI prompt tool and the TAZI Platform utilized multiple local LLMs (Large Language Models) for best results.

Approach

The process went as follows:

1. First, TAZI's VoC Solution used GenAI to predict topic and sentiment categories.
2. Second, the Customer Support leader provided feedback in the TAZI Platform to fine tune the GenAI predictions.
3. Then, to further increase the accuracy Business Analysts added customer-facing product guides and FAQ documents to the TAZI GenAI prompt tool.
4. Lastly, TAZI applied a "traditional" AI Solution to identify unexpected volumes of specific topics and sentiment.

Business Dashboards come with every Solution in the TAZI Platform and here the dashboards not only contained the topics and sentiment predicted using TAZI's GenAI, but also any unexpected volume of specific topics and sentiment, to help the team discover main areas or friction to help prioritize their efforts in improving customer experience.

Outcome

Compliant: Open source local LLMs (Large Language Models) are utilized in the solution and no customer data is getting out of the company's premises. Business experts control and guide AI by providing feedback directly in the TAZI Platform.

Easily Configurable: Business Analysts on the Customer Support team can continuously update the TAZI solution based on their emerging needs.

Flexible: Solution can run on CPUs and GPUs, thanks to breaking down the problem into smaller components and conquering them separately utilizing smaller LLMs.

At Scale Deployment: Customer communications from any channel (social, Google, yelp, surveys, complaints, etc) can be added automatically to the TAZI Voice of Customer Solution.

Conclusion

By leveraging TAZI's Voice of Customer Solution containing GenAI, Human Expertise, RAG, and "traditional" AI technologies, this $600M financial services company is on the way to having a holistic Voice of Customer view to identify and prioritize where they need to improve customer experience to make it easy to do business with them and improve the company's reputation and competitiveness.

Customer Testimonial

"We have been trying to create a solution for this for years and we can't believe that with TAZI we created a solution at scale, automated and reproducible, with initial results, in a week."

Senior Business Intelligence Analyst