



Best Practice - ITM Concierge and User Support

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Concierge and User Support Overview

The NCR Interactive Teller (and Banker) is a *new service delivery channel*, your users will need support as they see the solution for the first time. User assistance is critical and often referred to as *concierge, greeters* or *ambassadors*.

User assistance resources can....

- Help users become more comfortable with the new solution
- Determine the best ways to approach users as they see the device for the first time
- Guide users through the first few interactions
- Determine where internal resources will be positioned

User assistance is strongly encouraged for the first 4-6 weeks

- The first 30 days will be most challenging as customers see the system for the first time
- This time frame will cover a full payroll cycle and cover the most transaction volume
- The financial institution must determine how to allocate resources
 - *all day, everyday*
 - *peak hours, everyday*
 - *peak hours on high traffic days*

User assistance is strongly encouraged for interior units AND exterior units

- Develop a plan for both
- Support is critical in drive up locations since users are in vehicles instead of being in the branch environment
- Keep this in mind when discussing deployment (seasons of the year)



Concierge Responsibilities

Use the support staff located in the branch to

- ✓ Greet clients and “choreograph” the interaction of the users. Engage customers as they enter the branch and understanding what they have come in to the branch to do
- ✓ Personalize the experience by introducing the technology to first-time ITM users
- ✓ Instruct the user on how to initiate an Interactive Teller session

The support staff in drive up locations should also

- ✓ Personalize the experience by introducing the technology to first-time ITM users
- ✓ Instruct the user on how to initiate an Interactive Teller session

Both resources should be able to clearly articulate important information to potential users

- ✓ Educate consumers on the benefits of the new technology
- ✓ Explain how the Interactive Teller works
- ✓ Be prepared to answer questions and respond to concerns
- ✓ Reinforce that the video tellers are local and employees of the financial institution

Also, consider using these resources, as they are engaging with users, to collect feedback from the users once their session is complete. This is more of a brief check on the user’s experience, a few quick questions to gauge satisfaction.

Training Resources

Ensure user support resources are knowledgeable about the technology

- Provide training for support resources on the different peripherals/modules o the device so they will feel comfortable when assisting users
- Equip resources with “talking points”, messaging or FAQs, for consistent responses to user’s questions and any messaging to leave the user with
- Provide support resources training on how to help the user initiate a session and what is needed to get started and successfully complete a transaction



Ensure support resources know

- There should be a “soft” handoff to the video teller, transition from the concierge to the video teller should be smooth
- After transaction is initiated, and the video teller accepts the call, the video teller takes over and should assist the user from that point. The support resource should step back and let the video teller manage the session. The point is for the user to become comfortable with working with the video teller over video
- It is not advisable for the support resource to stand with the user, or “hover” over the user during the transaction

User Support Considerations

- A training plan should be implemented for user support
- Use what works best for your customers/members based on the level of service expected
- When supporting exterior placements consider Corporate Wear or provide badges/lanyards so the support resources aren’t mistaken for “random” individuals and alarm potential users
- Stage user support as an *event*. This can be an opportunity not only for Interactive Teller technology but for introduction of other products and services to consumers as well
- User support resources should be customer focused with an outgoing personality and great attitude

Identifying User Support Resources

Below is a list of resources to consider using for Concierge/User Support. These ideas have all been used by other financial institutions, the decision was made based on what worked best for their strategy

- Utilized part time resources from a hiring agency
 - Set up a pool of temporary resources, fully “vetted” for multiple functions and used for various positions
 - Trained specifically on concierge function per specific requirements
- Recruited resources from different areas of the financial institution who will support the solution
- Used marketing resources, specifically, to concierge because the marketing department wanted the feedback to update marketing messaging
- Used financial institution Executives at peak times
- Added responsibilities to permanent greeter/receptionist function (partnering with branch staff)
- Utilized branch staff in an expanded role
- Rotated video tellers through concierge role to show that the video teller are “real” employees

