

HealthEquity

TRANSFORMING CUSTOMER EXPERIENCE WITH AI-POWERED CONTACT CENTER

The Challenge

HealthEquity, a leading provider of health savings accounts (HSAs) and related financial services, found its legacy contact center to be too costly to maintain, inefficient, and most importantly, began having a negative impact on customer experience.

Facing significant operational challenges, the company sought a partner that could act quickly to upgrade its contact center. The resulting solution had to be more cost efficient while exceeding customer service expectations.

The Solution

HealthEquity partnered with Presidio to modernize and streamline its contact center operations.

Presidio demonstrated its commitment and expertise with a rapid response—developing and delivering a no-cost demo for HealthEquity's Investor Day in record time.

To drive long-term success, Presidio led workshops with key stakeholders to assess the current environment and prioritize high-impact automation opportunities. Presidio then built a plan to:

- ◆ Upgrade HealthEquity's traditional touch-tone interactive voice response (IVR) system to a voice-based system which would allow customers to interact using natural language.
- ◆ Consolidate various applications that HealthEquity had acquired over the years.
- ◆ Eliminate redundancies for smoother operations.
- ◆ Deliver a better end user experience anchored in proactive customer service.

Google Contact Center AI (CCAI) was chosen as the next-gen platform to replace the legacy system. Presidio collaborated with Google to integrate the AI solution seamlessly into HealthEquity's environment.

Through the course of this effort, Presidio became a trusted advisor supporting HealthEquity's commitment to digital innovation.



Services / Technology Used

- ◆ Google Contact Center AI (CCAI)

Results & Benefits

The partnership between HealthEquity and Presidio has transformed the contact center and driven substantial improvements in many key areas. These include:

Enhanced Customer Experience

The new voice-based IVR system improves self-service as customers can use natural language to get the help they need. The AI integration has helped HealthEquity better understand customer behavior and thus proactively address customer needs. The customer journey is more personalized and educational than ever before.

Significant Cost Savings

The strategic integration of AI and automation into the contact center has significantly reduced agent-handled calls. Self-service functionality has given HealthEquity breathing room and improved call containment rates. By consolidating applications, redundancy and training costs are reduced, and unnecessary overlaps have been eliminated. Further cost savings are being realized daily thanks to streamlined operations.

"PRESIDIO REALLY CAME IN AS A STRATEGIC PARTNER AND HELPED US ALIGN OUR DIRECTION AND VISION FOR AI TOOLS. THEY WERE ABLE TO HELP US PICK THE RIGHT AI TOOL THAT WOULD DELIVER THE BEST VALUE FOR OUR MEMBERS AND CLIENTS."

- Jess Cloud, Vice President of IT Operations and Digital Transformation

AI Integration

Presidio focused on AI-driven solutions like CCAI that provide maximum value while prioritizing data privacy. A key consideration for HealthEquity's clients is data privacy – the solution allows HealthEquity to better understand macro trends in customer behavior and offer proactive service without undermining sensitive client data.

Cultural Impact

The project created a more proactive and innovative culture, which is an asset in talent recruitment and competitive differentiation for HealthEquity. The company is positioned as a leader in the industry that is adopting cutting-edge technologies like AI.

Partners

Google

For more information visit
presidio.com

“MODERNIZING THE CONTACT CENTER HERE AT HEALTH EQUITY HAS REALLY ALLOWED US TO GET DEEPER INTO THE CONTACT RESOLUTION,” SAID CLOUD. “WE’RE PROVIDING FASTER RESOLUTION TIME FOR WHEN THEY NEED US AND SELF-SERVICE CAPABILITIES WHEN THEY DON’T NEED US.”



Google Cloud