

In recent years, the economic challenges we've faced have forced the financial services industry to examine many of their common practices in order to find more effective ways to protect the consumer. An increasingly litigious society has forced the industry to examine their liability risks in greater detail.

Although financial services companies communicate with their clients in far more ways than they did just a few years ago, phone conversations are still the preferred method of initiating transactions. Recording conversations between financial services reps and their clients is a necessity in order to ensure accuracy, outstanding service and protection from liability.

Recorded calls are also essential elements of dispute resolution, especially when millions of dollars are at stake. Secure recorded calls are also important in the fight to protect sensitive customer data from unauthorized use. In addition, recorded and monitored calls are one of best methods to provide coaching to financial service representatives. Initial sales calls can be reviewed to identify purchase barriers. The data obtained is used to develop strategies for future interactions. What better tool is there to help create training, manage performance and ensure compliance with company policies?

Versadial call monitoring and recording solutions are flexible, competitively priced and scalable to meet the needs of a growing firm. Here are a variety of ways you can use Versadial's tools to enhance many aspects of your business...

### Improved Customer Satisfaction

- Call monitoring ensures service standards are at their highest
- Call recording can be used to make refinements and develop processes that benefit customers, increasing their loyalty

### Dispute Resolution

- Flexible call search capability recovers calls quickly for review
- Playback, export and email functionality allows important data to be shared with stakeholders

### Quality Assurance and Employee Development

- Build better salespeople and customer service reps through structured coaching
- Ensure service levels are maintained at the enterprise level

### Regulatory Compliance

- Ensure compliance with federal and state financial industry laws
- Verify internal standard operating procedures are being followed

### Security

- Protect sensitive client data from unauthorized access
- Ability to encrypt recordings and have lockable vaults for added security

### Reporting

- Produce reports for performance tracking and productivity to use for evaluations, training and development
- Track call volume for certain marketing campaigns
- Adjust staffing to match periods of high call volume and maintain service levels

*Versadial call monitoring and recording solutions fit all budgets and work well with all modern telephony. Contact us today for more information.*

