

Self-Service & Maximizing Your FTEs

VISIONARY OICES 2025

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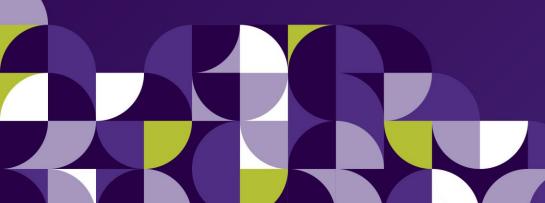
DBSI – Director of Equipment





Self-service refers to a system or process where customers or users perform tasks on their own without direct assistance from employees.

Self-Service Defined





Key Characteristics

- AUTOMATION DRIVEN
- INCREASED CONVENIENCE
- ACCESSIBILITY
- OPERATIONAL EFFICIENCY
- SECURE





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Consumer Preference

Self-Service at Checkouts

8400 Of U.S. consumers now prefer self-service kiosks

660 Of them choosing these options over traditional staffed checkouts



Self Service Options

Hardware

- ATM
- ITM
- Core Integrated Kiosk



ITM 2-Way Video

- Assisted Service
- Personal Connection with Live Teller
- Call Center for Video Tellers

of traditional teller transactions

Core Integration

- Self-Service
- Available 24/7

95% of the strain

of traditional teller transactions

Tech for Tech Sake

Why it fails

- Adoption
- Acceptance
- One-Size-Fits-All Approach



How Often It Fails

40%

Of Self-Service initiatives fail due to poor user experience, lack of incentives or inadequate customer education



How To Get It Right

- Strategy
- Partner
- QA Testing
- Training

- Education & Awareness
- Incentives
- Staff Reinforcement
- Expand Accessibility
- Continuously Improve

INTERNAL PLANNING

EXTERNAL PLANNING





Why It Matters

of customers unhappy with their bank's service may switch to another institution, highlighting the importance of maintaining reliable self-service options.



Maximizing FTE

- Shifting Transactions & Automated Back of House Processes
- Increased Capacity
- More with less





Thank You!

