Tealium Case Study
Financial Services Leader Transforms Contact Center Performance with Real-Time Customer Intelligence

Challenge

A leading financial services organization faced a critical disconnect between its digital and offline customer experiences. Despite having robust online loan application processes, the company struggled to convert customers who abandoned pre-approved loan applications—a high-intent segment representing significant lost revenue.

Solution

The organization implemented Tealium AIStream to create a real-time customer data orchestration platform powering prioritized call center outreach.

The foundation was a unified customer view that stitched together web behavior, mobile app activity, CRM profiles, and internal credit scoring into persistent, person-level profiles. This enabled accurate prospect qualification and routing based on complete customer context.

Results

- **2x increase in contactability** through real-time activation and propensity-based prioritization

- **11% conversion lift** on the targeted cart recovery journey

- **12% growth in annual digital sales** attributable to recovered loan applications

- **Less than 1 day time-to-market** for operational changes, enabling continuous optimization

- **Scaled across 13+ products** while maintaining efficiency gains

12% Annual Sales Growth

2X Increase in Contactability

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The core challenges included:
- **Inefficient outreach:** Manual selection of prospects and non-prioritized call lists diluted agent effectiveness and increased contact costs
- **Poor timing:** By the time agents reached out, customer intent had cooled, resulting in low contactability rates
- **Fragmented data:** Web behavior, app activity, CRM records, and internal credit scores existed in silos, preventing a unified view of customer readiness
- **Slow iteration:** Legacy processes couldn't adapt quickly to changing business rules or product requirements

Leadership needed a solution that would translate "one customer, one experience" from a digital aspiration into measurable call center revenue and efficiency gains through a true next-best-action approach.

Solution

The organization implemented Tealium AIStream to create a real-time, unified customer data orchestration platform that powered prioritized call center outreach:

Unified Customer Foundation
- Deployed Tealium's Single Customer View and identity resolution to stitch web behavior, mobile app activity, CRM profiles, and internal credit scoring into persistent, person-level profiles
- Enabled accurate qualification and routing of prospects into actionable audiences

Intelligent Prioritization
- Built dynamic audience rules based on cart abandonment status, loan eligibility, and propensity scoring thresholds
- Created a master queue that sequenced outreach by likelihood to convert and recency of abandonment, ensuring agents focused on the highest-value opportunities at peak intent

Omnichannel Orchestration
- Published real-time call lists directly to the contact center stack for immediate agent action
- Deployed coordinated email and push notifications as secondary touchpoints when initial call attempts didn't connect

The first-party, data-neutral, vendor-agnostic architecture ensured compliance flexibility while supporting rapid iteration—with rule and audience changes going live in less than one day.

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Results

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Why It Worked: Precision targeting from unified customer profiles reduced agent misrouting and wasted effort. Propensity-based sequencing aligned outreach with genuine customer intent, improving conversion while lowering cost per acquisition. Omnichannel reinforcement protected momentum when prospects weren't immediately reachable by phone.

The combination of real-time data activation, intelligent prioritization, and operational agility transformed the contact center from a cost center playing catch-up into a revenue-generating engine that engages customers at exactly the right moment.