



THE POWER OF VOICE IN FINANCIAL SERVICES AND INSURANCE

3-step checklist to build trust, compliance,
and personalisation



Good business starts with better listening

In FS&I, voice remains one of the best channels for boosting customer trust. Modern AI-enhanced voice solutions bring businesses closer to customers—improving CX and bolstering confidence without compromising complex compliance and security requirements.

This checklist will give you the actionable steps for modernising your legacy voice systems with AI to build better experiences.

“One of the best ways to improve time-to-resolution is to offer things proactively, rather than having to push for service.

Research shows that, while customers may end up with the same outcome, getting there can be frustrating and slow if the brand waits for requests rather than make relevant offers”

Professor Elizabeth Stokoe

London School of Economics and Political Science
Twilio, ‘Why Good Listening Means Good Business’

Modernise your voice stack

Modernising your voice technology – including your contact centre and IVR solutions – to expertly deal with customer enquiries is key to not only meeting, but exceeding customer expectations.

Tailor your solution

Review your legacy voice infrastructure to make sure it meets today’s demands for flexibility, scalability, and speed – as well as smooth integration with emerging technologies.



Refine your intelligence to deliver secure, personalised, connected customer experiences across all voice channels. This allows you to develop the granular understanding of each customer’s circumstances required to deliver excellent service - in line with all the mandatory regulatory requirements.



90%

of financial firms still rely on legacy technology,
putting newer brands at an advantage.

Financial Conduct Authority (FCA), FT Partner Content



Give your teams real-time context

Customers of all ages appreciate personalised experiences - but research reveals those in the 16-24 age group actively expect them.

Build the foundation for personalisation

Use voice analytics for a transparent view of your call performance, emerging trends and potential issues.

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Create rich, user-centric call records using post-call data, metrics and real-time events.

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Use real-time data from your CRM systems and previous calls to create more cross-sell and upsell opportunities.

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Use call routing to connect customers to the right agent faster and voice intelligence to transcribe calls and extract the right intent signals and information.

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48%

of people say that speaking to a real person makes them feel most understood and listened to by a brand.

Twilio, 'Why Good Listening Means Good Business', 2024



One voice platform for all interactions

Earning and maintaining trust is a critical strategic objective in the financial sector. Allowing your customers to speak to agents whenever necessary is the building block of customer confidence and loyalty.

Elevate your systems

Ensure human agents are always available to deal with more complex customer care issues. Use AI to create better self-service experiences, which are automated but personalised through rich data.

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Communicate with customers flexibly but consistently. Use programmable voice to add inbound and outbound voice calls to your web or mobile app. Incorporate SMS, MMS, and 3rd-party integrations like WhatsApp.

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69%

of respondents who feel listened to by a brand are most likely to buy from that brand again.

Twilio, 'Why Good Listening Means Good Business', 2024

Got five minutes (or less) to find out how ING partnered with Twilio to bring AI into their contact centre and improve CX?

Learn more about the value of voice

[Read article](#)

