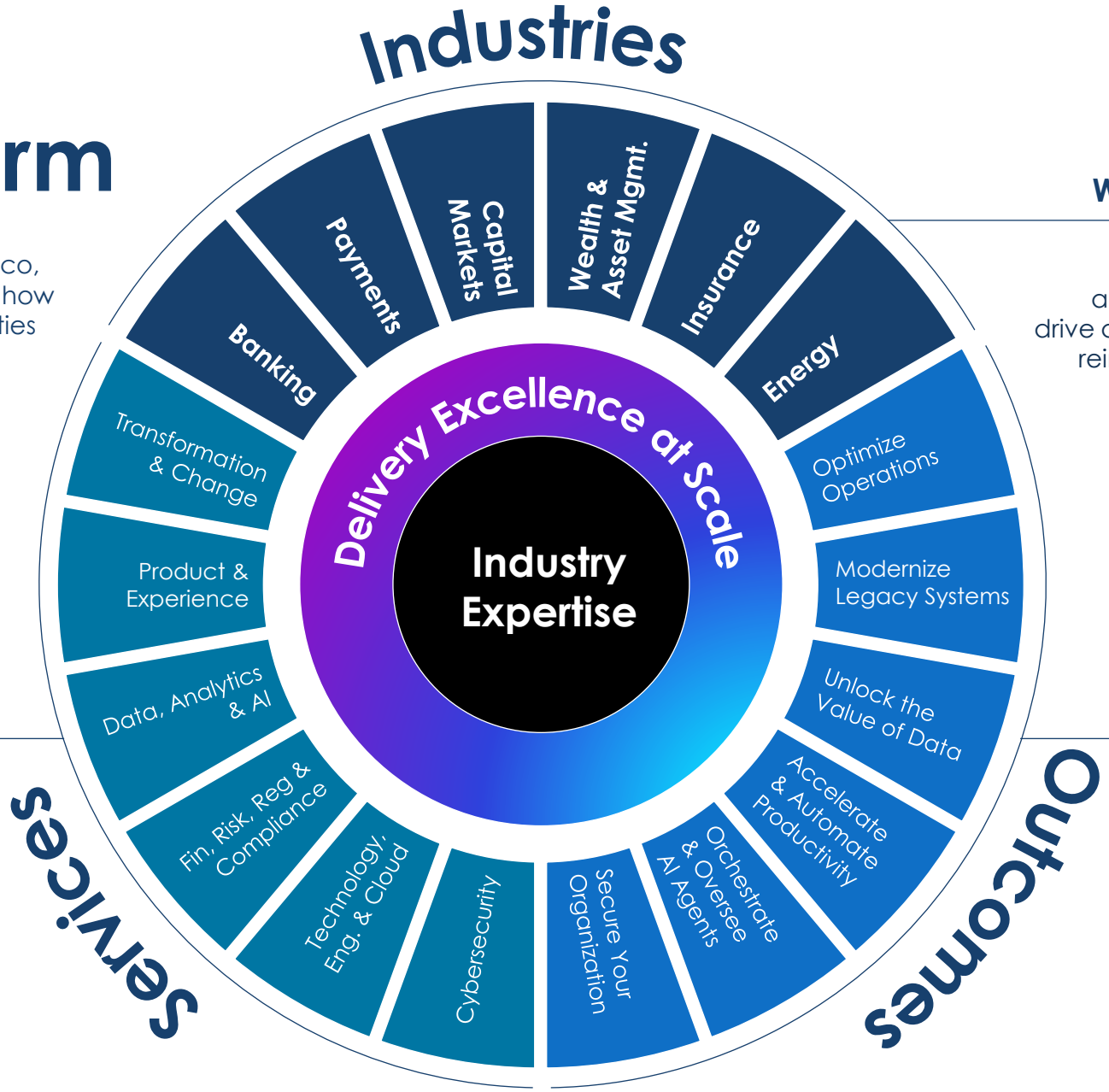
CAPCO

Intelligent Client Query Management

Together, We Transform

From building banks to AI infusion, Capco, Wipro and Microsoft can help reinvent how you do business, reinforce the capabilities needed to thrive in the age of AI and realize your ambitions for sustainable, scalable and resilient growth.



Reinvent

With Industry Leading Advisors

We bring industry-changing ideas – and the delivery capability required to drive differentiation, efficiency and agility – reinventing how you create and unlock business value

Reinforce

With AI-Infused Capabilities

We develop, integrate and embed the specialist skills and services required to thrive in the age of AI – cutting complexity, driving innovation and supporting growth

Realize

Business Focused Outcomes

We accelerate value creation through consulting-led outcome-focused solutions that realize the potential of integrated, technology-enabled transformation

© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.

Intelligent Client Query Management
is an end-to-end integrated proposition to help our clients optimize their customer engagement and query resolution, leveraging AI and automation, to enhance customer experience and improve operational efficiency

© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.

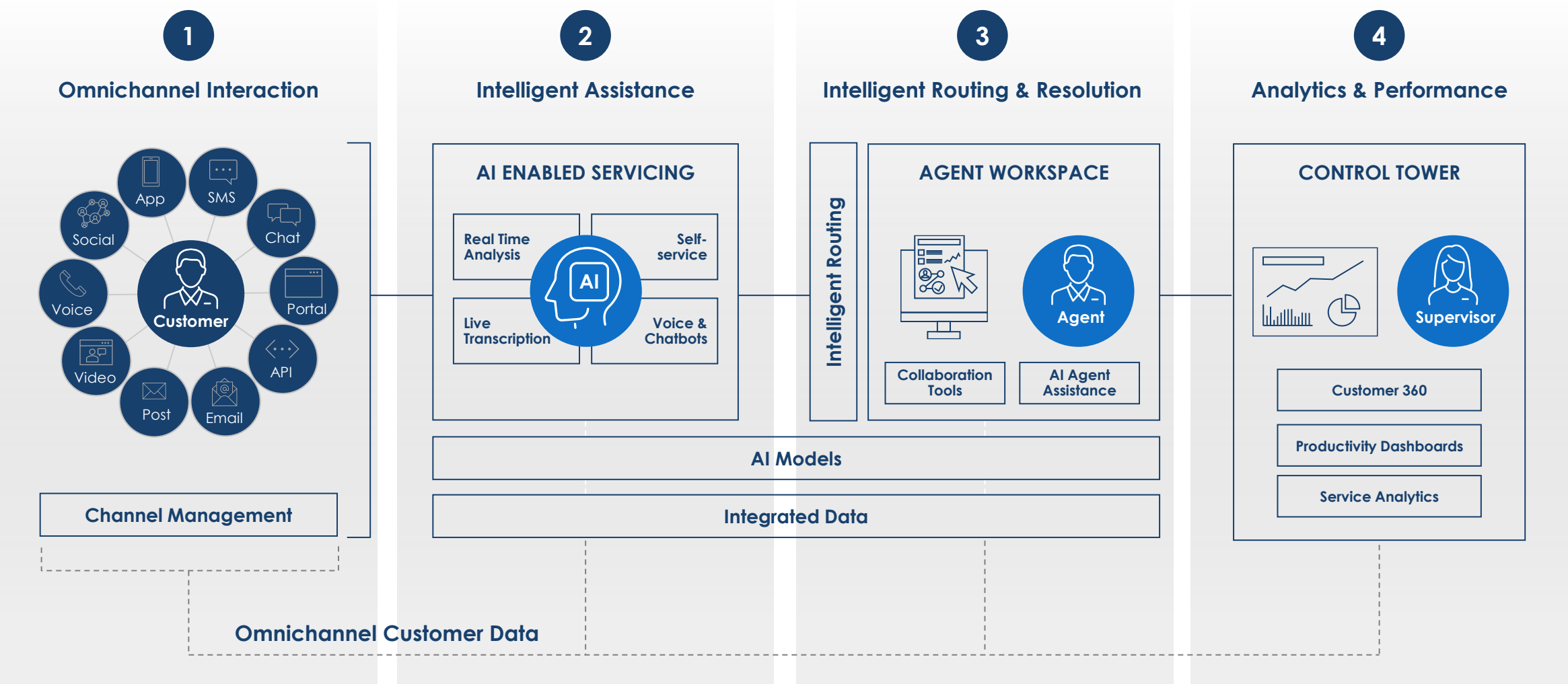
Enhance customer experience and optimize efficiency by accelerating and automating query resolution using AI

Common ICQM pattern that can be adapted to cover different client service and operational use cases.

Ingest	Extract & Understand	Route	Resolve	Monitor & Control
Receive and capture queries from multiple channels	**Understand and categorise queries with AI**	**Intelligently route cases for first time resolution**	**Automate Smart look up and response**	**Track performance and derive query insights**
• Real-time omnichannel integration (email, chat, telephony, etc)	• AI-driven classification • Entity extraction • Case enrichment • Sentiment analysis • Language translation • DQ checks & validation	• Intelligent routing based on capacity, priority, client, product & operator skills • Risk and complexity-based routing	• Case Summarisation • Case Prioritisation • Automated data lookup, response and resolution • AI powered smart response	• Real time dashboards • Risk-based analytics • Root cause analysis
Exchange **Power Automate**	**Power Automate** **AI Builder**	**D365 Customer Service** **AI Builder**	**Power Automate** **AI Builder** **Copilot**	**D365 Customer Service** **Power BI**

© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.

Ingest, process, orchestrate and resolve omnichannel queries



© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.

An end-to-end playbook for customer service transformation

1 Customer Requirements

Understand customer expectations to inform service design

Analyse customer interactions to understand query root cause. Leverage insights to prioritise digitisation, self service options and white glove service

2 Self Service

Reduce query volume through self service

Enable clients to independently and instantly resolve common and simple queries. Empower customers through digital channels and AI assisted self-service tools

3 Intelligent Controls

Implement controls to prevent avoidable queries

Implement intelligent controls and checks to prevent customer queries. Pro-active and predictive monitoring of potential issues with outreach

4 Technology Capabilities

Build smart shared services and capabilities

Design and build flexible architecture and technology capabilities. Embed AI and automation design patterns across all omnichannel customer touchpoints

5 Operating Model

Optimize the customer service delivery model

Design servicing operating model with consistency across products and regions. Shift focus from manual, repetitive tasks to customer care and high value servicing

© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.

Capco increased first-contact query resolution to >90% and reduced average query handling time by 75% using AI

Engagement Context

Challenge:

A global bank's client servicing was highly fragmented and email-driven (over 3,000 mailboxes handling ~60 million emails annually). There was no end-to-end ownership of queries, limited real-time visibility, and poor client experience (low NPS) due to delayed responses and frequent hand-offs. Operational teams lacked analytics to identify root causes, resulting in repetitive issues and inefficiencies.

Objectives:

Assess & Align: Evaluate the current query management landscape across divisions to identify pain points (fragmented mailboxes, manual processes, lack of metrics).

Design ICQM Framework: Define a target operating model and AI-powered case management approach to route and resolve queries intelligently, improving speed and customer satisfaction.

Implement & Scale: Deliver a pilot ICQM solution (in collaboration with Microsoft Dynamics 365) and develop a roadmap for enterprise-wide rollout with clear KPIs and business case for ROI.

Outcomes

>30% **Reduction in Resolution Time:** improving service levels and client satisfaction

+35% **Client Satisfaction (NPS) Increase:** due to enhanced first-time resolution and better transparency

>$6m **Efficiency Savings:** operational cost savings over 3 years through automation and workload reduction

>17 **Markets Deployed:** covering 45k clients and scaled to 17 markets across the bank's global operations within 12 months

Key Features

- ICQM Strategy & Operating Model
- AI-Infused Case Management System
- Smart Response Automation using Agents and AI
- Analytics & Continuous Improvement
- AI-based Classification and Intelligent Routing

© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.

CAPCO

WWW.CAPCO.COM

CAPCO
a wipro company

© 2025 The Capital Markets Company. Capco Confidential. All rights reserved.