



### ABOUT

Neo Financial, a Canadian fintech company, envisions a banking future free of the constraints of traditional banks. Recognizing a lack of progress with financial services in Canada, Neo aims to revolutionize banking by leveraging technology and industry expertise. With no physical branches, their approach centers on innovation and limitless possibilities. Drawing from their success with SkipTheDishes, Neo is committed to enhancing Canadians' spending, saving, and rewards experiences. Their journey is marked by milestones as they strive to reshape the financial landscape for millions across Canada, driven by a relentless pursuit of progress.



### CHALLENGES

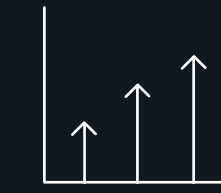
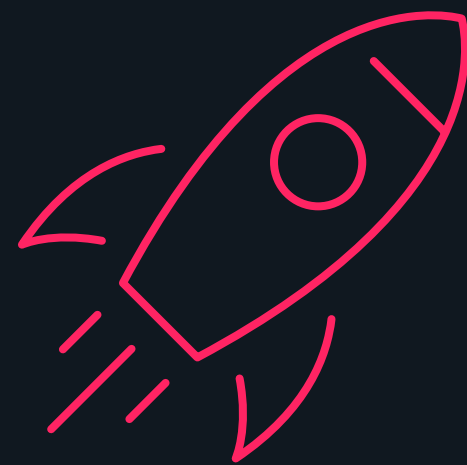
- Incorrect data mapping within the system created inaccurate forecasts
- Needed separate instance for Zendesk and AWS
- Data was reorganized during the implementation
- Complex schedules with full-time and part-time variables caused scheduling issues

### SOLUTIONS

- Playvox Workforce Management - Advanced forecasting, optimized workforce management, and enhanced reporting capabilities drive their success
- Neo and Playvox accurately mapped data, improving data flow
- They maintained data integrity and addressed integration issues

## MAJOR BOOST

Productivity and service quality due to improved workforce management and staff allocation



### BIG INCREASES

### FORECASTING ACCURACY IMPROVED

To within a 2-3% margin

### FROM 25% TO 80-90%

Service levels on Mondays and Tuesdays improvement

