

## Upstart Improves Reliability and Scalability with Bright Pattern Contact Center and Salesforce CRM



### Background

Upstart is the first AI-powered lending platform designed to improve access to affordable credit while reducing the risk and costs of lending for bank partners. By leveraging Upstart's AI platform, banks can have higher approval rates and lower loss rates, while simultaneously delivering the exceptional digital-first lending experience their customers demand.

Upstart discovered the right contact center infrastructure could serve as a strategic differentiator that empowers agents to deliver much higher quality customer service.

### Challenges

Upstart was previously working with Five9, but experienced a lot of problems, such as dropped calls, bad connection, bad feedback, and low call quality. When Upstart called Five9's tech team for support, they didn't provide very much information or prioritize Upstart's challenges. Five9 also didn't sync with Salesforce, even though it claimed it did.

### Objectives



100% uptime with active-active architecture and instant access to newly released versions of the platform



Out-of-the-box integration to Salesforce with customization options



Better connection, better call quality and dropped calls



Centralize omnichannel real-time reporting capabilities



ROI payback achieved in months and are now extending to other business units



PCI DSS Compliant solution with advanced encryption



We were paying a lot of money [for Five9]. We were probably small fish for them and they didn't want to deal with our phone quality issues. We decided to change.



## Solution

Upstart performed extensive due diligence and looked at a lot of companies. The top priority was call quality and UI, which can be hard to evaluate. When Briana Case, Head of Investor Operations at Upstart, asked colleagues at other startups for recommendations, someone suggested Bright Pattern. The pricing worked out, the UI was great, and Bright Pattern offered a long trial period, allowing Upstart to determine overall call quality.



We have a very unique Salesforce design and Bright Pattern's team put in a lot of time to make sure our integration worked seamlessly from day one.



Bright Pattern helped Upstart transition off of Five9, implement the features it needed, and integrate with its existing phone systems, as well as link to its service platform and other vendors to create an integrated experience. Many of the features that needed to be incorporated were complicated, as well as making the new system fit within what Upstart already had. Bright Pattern worked with them as a partner from the beginning of the process to get it all right. "Their technical support team is one of the best I've ever worked with," said Briana Case, Head of Investor Operation at Upstart. "From a creative problem solving perspective, plus an eagerness and willingness to help. They built some special things for us because we really needed them to have our contact center run the way we wanted it to run."

## Results

Working with Bright Pattern changed Upstart's approach to the contact center. Now, it's a strategic differentiator, delivering the high quality customer experience that's essential to the business model. They noticed improvements in almost every area of performance, including: shorter call waiting times, streamlined outbound calling, improved call qualities, improved system reliability, overall ease-of-use for agents and customers, faster agent onboarding, and better access to customer data.

With Bright Pattern powering their contact center, their agents can focus less on the tools and more on their customers.

 Reduction in average call waiting times

 Streamlined outbound calling campaigns

 Centralized reporting across all channels

 100% cloud-based solution supporting 100% uptime

 Improved ease of use for agents and customers

 Integration with existing Salesforce CRM



Not only is the technical product robust, their technical support team is one of the best I've ever worked with. They built custom functionality for us to have our contact center run exactly the way we wanted it to run. Bright Pattern works so well we don't have to think about it.

