



Call Centre Desktop: Delivered with Desktop Interoperability





Call Centre Desktop

Powered by **interop.io**

Insurance call centre agents operate under pressure, managing high volumes of customer interactions while navigating multiple, disconnected systems to access policy details, claim status, communication records, and billing information. This fragmented experience results in longer call times, inconsistent service, and increased agent stress.

A modern Call Centre Desktop powered by desktop interoperability provides a smarter way forward. Rather than replacing existing systems, it connects them all to create a seamless, intelligent workspace where all customer data, tools, and workflows are unified into a single, integrated experience.

By integrating legacy and modern applications, surfacing AI-powered recommendations from internal AI platforms, and enabling real-time data synchronization, an interoperable Call Centre Desktop empowers agents to work more efficiently, respond with greater accuracy, and deliver a more consistent and personalized customer experience.

The problem:

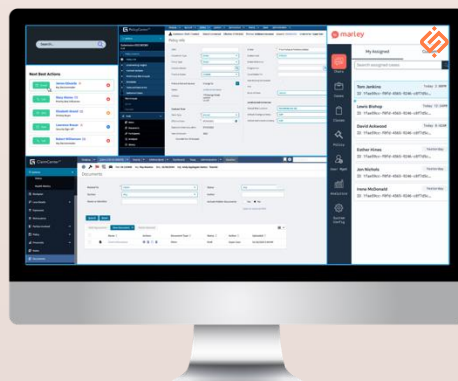
- CS Agents juggle disconnected apps.

The solution:

- Unified desktop with AI via interop.io.

Value proposition:

- Preserve current systems, add efficiency.





Introducing interop.io

[interop.io](https://www.interop.io) is the industry's leading desktop interoperability platform, purpose built to unify applications, data, and workflows across modern and legacy systems without the need to re-platform.

Trusted by major enterprises in Financial Services, interop.io empowers companies to modernize operations, improve decision making, and accelerate digital transformation. We are bringing this same innovation to the Insurance market.

J.P.Morgan

- 35,000+ Wealth Advisors users

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- 18,000 Traders

Fidelity
INVESTMENTS

- 15,000 Wealth & Asset Managers

The Challenge

Call Centre's rely on fragmented systems, leading to manual processes, slow resolutions, and burnout. Without integrated tools, context switching causes delays, errors, and inconsistent decisions.



Users toggling between 30+ apps have an error rate increase of 28%

Interoperability Solution

Desktop interoperability is the ability to connect and orchestrate multiple insurance applications across legacy and modern systems into a seamless, intelligent desktop experience



Effortless, Frictionless & Data-driven Desktop

“By 2024, organizations that adopt composable interoperability will outpace competition by 80% in the speed of digital transformation.”

— Gartner, Strategic Roadmap for Integration Modernization

Operational Challenges for Call Centres

Fragmented Customer View Across Systems: Call centre agents often switch between multiple systems (CRM, policy admin, billing, claims, communications) just to answer a single query. This context switching slows response times and increases the risk of errors.

Manual Navigation and Data Entry: Agents must repeatedly copy and paste customer details or re-enter policy numbers across systems, increasing handle times and the likelihood of mistakes during busy periods.

Delayed First Call Resolution: Lack of integration prevents agents from accessing the full customer history or claim status in real time, forcing callbacks or transfers and reducing customer satisfaction.

Inconsistent Service Quality: Without a unified desktop, service delivery can vary greatly between agents depending on their experience and familiarity with individual systems.

Limited Visibility into Agent Performance: Disconnected systems make it difficult for team leads to analyze workflows, identify bottlenecks, or understand where efficiency improvements are needed.

Agent Fatigue and Turnover: High-volume, repetitive tasks like navigating multiple UIs or searching for scattered information contribute to agent burnout and low job satisfaction.

Lengthy Ramp-Up for New Agents: Training new hires on several complex systems extends onboarding time and delays full productivity, especially in high-turnover environments.



Call Centre Desktop Innovation

Insurers today are looking to modernize call centre operations without the cost and disruption of replacing core systems. The interop.io Call Centre Desktop provides a powerful solution: a unified, intelligent workspace that connects customer service tools, streamlines interactions, and enhances response quality through embedded automation and integrated AI systems.

The interop.io Call Centre Desktop provides a powerful solution: a unified, intelligent workspace that connects customer service tools, streamlines interactions, and enables embedded automation and AI capabilities.

Typical applications integrated include CRM, multiple policy administration systems, claims systems, quoting and billing platforms, email and chat tools, document management systems, and telephony.

Key features include a unified customer view, integration with AI-powered next best actions, automated data entry, integrated communication tools, and seamless cross application navigation. By enhancing current systems through desktop interoperability, insurers can significantly reduce average handle time, improve first call resolution, and deliver faster, more consistent customer service without replatforming.

Interop.io powered – Call Centre Desktop

Typical Call Centre Challenges	The Desktop Interoperability Solution
<i>Agents toggle between multiple systems (CRM, policy, billing, claims, email/chat, telephony)</i>	<i>Combines all essential applications into a unified desktop, reducing context switching and improving focus and speed.</i>
<i>Slow average handle times (AHT)</i>	<i>Speeds up interactions by enabling real time data access, preloading relevant screens, and streamlining workflows.</i>
<i>Repetitive manual data entry and copy-paste across systems</i>	<i>Enables shared context and automation across apps—enter once, sync everywhere.</i>
<i>Inconsistent customer experience due to system complexity</i>	<i>Standardizes workflows with the integration of AI-driven prompts and guided interactions, regardless of agent experience.</i>
<i>Difficulty accessing full customer history or policy data</i>	<i>Brings together CRM, policy admin, claims, and documents into one view for a complete, contextual customer profile.</i>
<i>High training and onboarding time for new agents</i>	<i>Simplifies the user interface by presenting only role-relevant apps and steps in one workspace, reducing training time.</i>
<i>Frequent call transfers due to lack of insight</i>	<i>Provides agents with full visibility into policy and claims data, enabling first call resolution.</i>
<i>Agents struggle to keep up with changing processes or compliance</i>	<i>Delivers in-workflow notifications, AI-powered recommendations, and process updates directly within the desktop.</i>
<i>No real-time & operational single source of truth for customer interaction data</i>	<i>Centralizes data and interactions via integrated systems and shared state, reducing data duplication and errors.</i>
<i>Low agent engagement and burnout</i>	<i>Reduces frustration by automating low value tasks and making complex processes easier to manage through a unified desktop.</i>



Solution Overview – io.Connect Platform

Desktop Interoperability: Unify Systems, Accelerate Innovation, Build Value

Desktop interoperability isn't an application. It's a flexible framework that connects your existing applications & tools and enables them to work together across the desktop, looking and feeling like a single application.

It lets you define and automate workflows across internal and third-party apps, legacy or modern, without rebuilding or replacing systems. Users work faster and smarter with real-time connected tools. Integrated AI-powered recommendations surface insights, guide next steps, and improve decisions without switching systems.

Use what you have to build what you need. Create any workflow or process using your existing systems. It's not just integration. It's innovation tailored to your business. From claims and call centres to underwriting, design the logic and flow using the tools your teams already trust.

interop.io Core Products	Product Capabilities
io.Connect Desktop Integration & Workflow Engine	<ul style="list-style-type: none">➤ Connects web, native & legacy apps➤ Enables real-time context & data sharing➤ Streamlines workflows without replacing systems
io.Insights Analytics & Operational Intelligence	<ul style="list-style-type: none">➤ Tracks app usage & user behaviour➤ Surfaces workflow & UX insights➤ Informs IT with data-driven decisions➤ Supports compliance & governance
io.Manager Centralized Desktop Management	<ul style="list-style-type: none">➤ Administers apps, layouts & preference➤ Manages role-based access & deployment➤ Monitors sessions & captures feedback➤ No-code setup for quick rollout



Solution Overview – io.Connect Platform



Single Pane of Glass: The consumption layer through which end users interact with applications in a customised UX, which brings together all the applications needed to perform specific tasks.

Data Plane: The data distribution layer which binds together all applications in a single functional UX, data is stored in memory to provide a shared context for all applications, providing structured storage with publish and subscribe, push and pull data patterns.

Control Plane: The functional control layer, providing the capability to manage window layouts which can be saved and restored on a task-by-task basis, cross-application workflows, and inter-application communication (RPC).

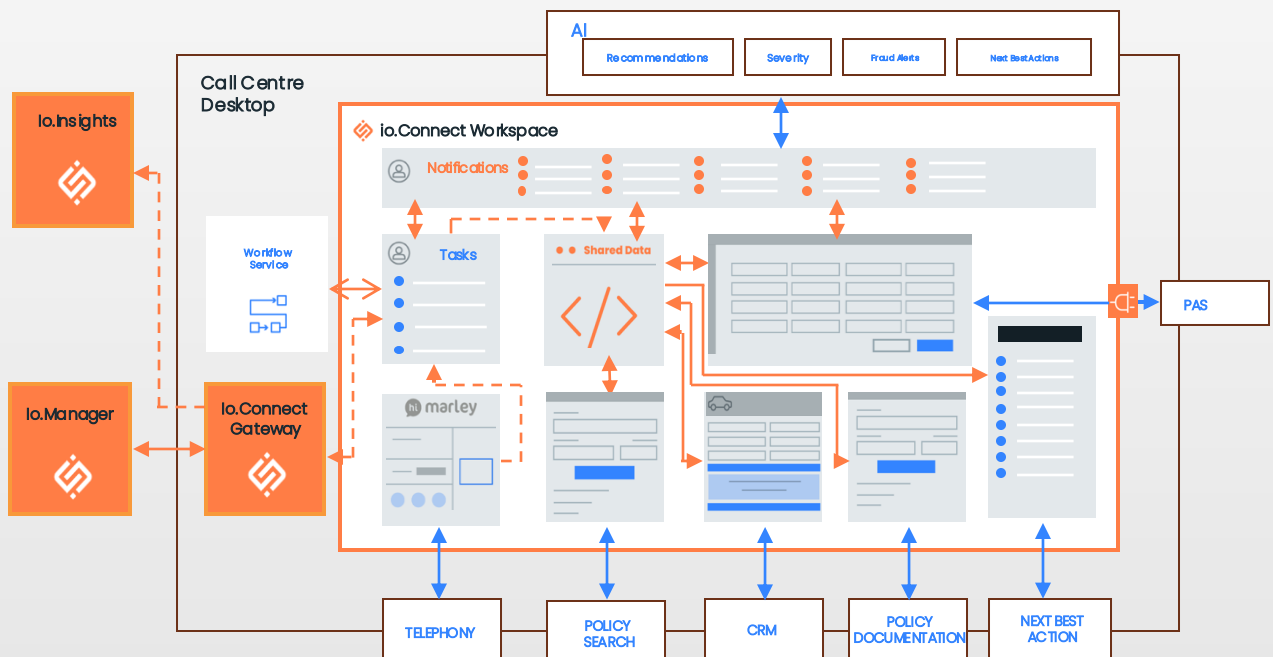
Enterprise Application Plane: Applications presented in the single plane of glass continue to communicate with their respective backend services unimpeded by the io.Connect Platform. Connectivity between the io.Connect Platform and enterprise applications can be extended via the use of system specific adapters.

Solution Overview – Call Centre Desktop

How io.Connect will enable the Call Centre Desktop

The io.Connect platform will provide the following capabilities:

- The ability to present multiple disparate application UIs both new and existing within a common user experience (UX) represented below as the io.Connect Workspace
- The ability to connect these UIs via a shared data capability which will provide data synchronisation between UIs without the need for backend integration.
- The ability to orchestrate multiple application UIs to implement cross-platform workflows
- The ability to surface AI-originated recommendations, alerts and insights as actionable notifications





Solution Overview – Development

io.Connect Platform Development Accelerators

io.Connect provides a suite of features that accelerate the journey from prototype to production delivery. Every desktop project requires a foundation of core capabilities that represent a significant proportion of the development effort. interop.io has invested many decades of accumulated development effort to deliver this foundation so that our customers can focus of business specific requirements.

Interop.io features	Description
Application Integration	Seamless integration of UI and data from web, desktop and legacy systems.
Window Management	Robust APIs for window manipulation, docking, tabbing, grouping, and layout persistence.
Context Sharing	Securely control data propagation across apps.
User Experience Personalization	Supports customization and persistence of user-defined layouts and preferences, with state restoration across sessions.
Global Search	Quickly find information across all apps.
Notification Management	Centralize app notifications and associate with context specific action handlers.
Compliance and Security	Real-time monitoring, logging, and enforcing compliance policies, with audit trails and access control.
No-Code/Low-Code Integration	Supports integration of diverse apps with minimal coding effort, utilizing pre-built connectors, adapters, and APIs.
Performance Monitoring	Tools and APIs for real-time performance tracking and analysis, enabling proactive issue resolution.



Solution Overview – Application Integration

Connect Anything

Presenting apps in a unified “single pane of glass” improves usability but true transformation comes from desktop-level integration. Horizontal integration allows applications to share data, trigger actions, and support full end-to-end workflows.



io.Connect enables this through platform-specific capabilities:

- Language Bindings (JS, React, Angular, Java, .Net, VBA): Easily integrate apps by adding an io.Connect library. Apps can publish/subscribe to shared data, invoke cross-app methods (RPC), and open apps on demand.

Application Adapters (e.g., Salesforce, Microsoft Office):

- Adapters handle interface logic and enable two-way communication. For example, a syncCustomer method from a claims app can update and display the matching record in Salesforce automatically.

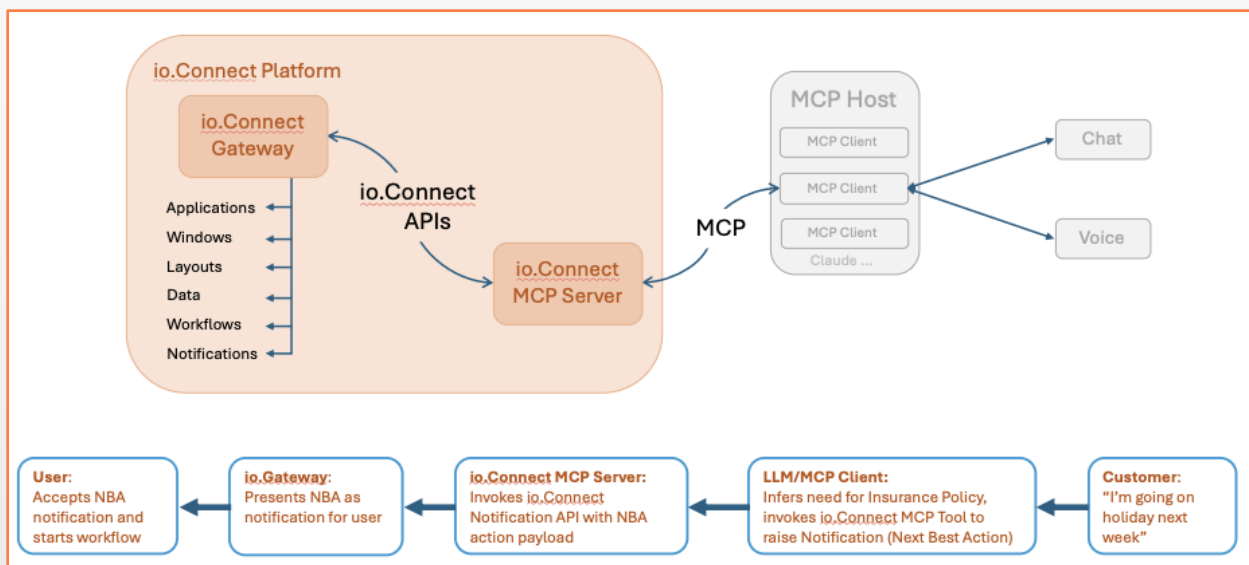


Solution Overview – AI Enabled Desktop

io.Connect Platform AI

The adoption of AI presents challenges at the UX layer, with many firms struggling to deliver consistent, actionable insights. Users are often overwhelmed with information that lacks context, making it difficult to apply AI output effectively.

- io.Connect addresses this by consolidating AI output into a unified stream of insights through io.Connect Notifications. This ensures users receive relevant, contextual information from a single source. The platform enhances AI output by linking it with real-time application data, such as fraud alerts, next best actions, or product recommendations, and surfaces this within the right UI.
- Through the io.Connect MCP Server, interoperability tools allow large language models (LLMs) and retrieval augmented generation (RAG) systems to send intelligent, context-aware instructions directly to the desktop.



Example Use Case: A call centre agent answers a policyholder query about billing discrepancies. AI identifies a recent system error, flags a refund opportunity, and recommends a resolution script. A workflow is triggered that opens the billing system, customer profile, and refund form. The agent is guided step by step, enabling a fast, accurate, and personalized response.

Key Benefits of Desktop Interoperability

REDUCE OPERATIONAL COSTS

- Automate routine tasks like rekeying data and switching between apps
- Connect legacy and modern systems without costly rebuilds
- Minimize reliance on manual processes and custom integrations
- Streamline workflows to lower the cost per policy, claim, or interaction

IMPROVE CUSTOMER EXPERIENCE

- Deliver a 360° view of the customer across CRM, billing, claims, and policy systems
- Pre-load relevant data based on user context for faster service
- Enable seamless, personalized support without system switching
- Increase satisfaction, reduce churn, and boost customer loyalty

EMPOWER YOUR WORKFORCE

- Provide intuitive, role-based workspaces with integrated tools
- Reduce app fatigue and cognitive overload for front-line teams
- Enable faster, smarter decisions with real-time data access
- Accelerate onboarding and improve morale with simplified workflows



Case Study: **Leading Global Investment and Wealth Manager**

A global investment and wealth firm needed to modernize its desktop experience to unify workflows, reduce duplicated efforts, and enable consistent development practices across business units. Facing a complex mix of legacy systems and evolving user needs, they partnered with interop.io to build a scalable interoperability framework.

Challenge

The firm required a unified approach to application delivery and governance across front, middle, and back-office teams—ensuring consistent UX, seamless data sharing, and reusable components.

Solution

interop.io deployed a modular desktop using io.Connect, io.Manager, and io.Insights. This allowed:

- Contextual data display based on real-time events (e.g., client records)
- Decomposition of legacy .NET apps into dynamic, reload-free modules
- Angular-based widgets showing AI-driven recommendations

Outcomes

- Streamlined workflows & UI: Modular desktop synchronized data across apps
- Faster delivery: New capabilities launched faster at lower cost
- Improved governance: A Center of Enablement enabled reuse and collaboration

interop.io helped transform a fragmented desktop into a responsive, efficient, and scalable digital workspace.



For more information

Please contact – sales@interop.io

[interop.io](https://www.interop.io) is an award-winning desktop integration platform that is reinventing technology, business, and operations in the financial services industry. It provides a one stop shop for building best-of-breed integrated desktop experiences for financial institutions globally.

[interop.io](https://www.interop.io) aims to blur the boundaries between applications and create seamless AI-powered integrated desktop experiences for end users by allowing the creation of cross-application workflows and workspaces, app stores, centralized notifications, global searching and more on financial desktops regardless of the underlying technology.

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