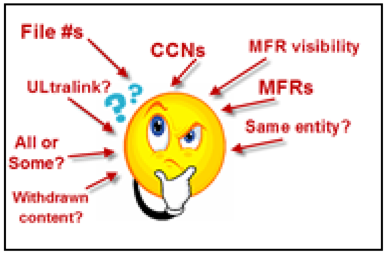
Title: *Simplifying Customer Information Updates*

Problem:

When customers change their legal entity, there may be a cascade of information updates in the customer files within the business. Coordinating the updates and confirming they are made correctly is complicated by the expectation from customers that this is an easy process.

Analysis:

The team scoured the communications records for each of these instances. They discovered that many individuals were asked to review the updates even when their area of expertise was not impacted. This resulted in hours of work and days of time that were not necessary. In addition, the customer information was sensitive and needed to be better protected.



Countermeasure:

The team devised a script for the Customer Service Representative to follow to assure that all the information from the customer was gathered correctly in the first phone call. Now, when legal, accounting, Sales, or engineering needed to be involved, it was identified right in the initial conversations. The CSR set appropriate expectations with the customer and protected their information.

Results:

Customers were pleased that their file changes were managed more rapidly and with fewer conversations. Fewer errors resulted from the streamlined communications while work was handled only by the resources required given the specifics of the situation.