

Company Seeks Assistance to Transform Customer Service Operations

Client Problem

A service firm wanted to understand the root cause of some of its problems with customer service agent turnover and training. They needed to determine if its existing CRM system should be modernized or replaced.

WTA Solution

WTA performed a thorough review of the existing processes being used in the customer service area of the company. WTA interviewed the sales, marketing and customer service personnel to understand the current processes, how they related to the system and identified 21 major processes in place.

WTA's team then developed current workflows, identified bottlenecks and redundant processes, and developed recommendations for process and system improvements. WTA also placed all documentation related to the current services, workflows and job aids into a collaboration tool to be used for training, documentation and standard procedure maintenance.

Successful Outcome

Identifying the sources of difficult and expensive processes, allowed WTA to focus the client on the most beneficial areas of improvement to its business and to its clients, and facilitated strategic planning sessions with the team to identify and prioritize improvement projects.



WTA facilitated process documentation and current environment assessment across the areas of sales, marketing and customer service.

The leadership team began to see that the areas they needed to focus on were automation and the definition of a new set of requirements for technology to support their critical business functions.

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