



## **Case Resolution Process Assessment**

*“Improving the case resolution process”*

The heart of a successful customer support operation is the “process model”. Then you need well-trained and highly-motivated “people” to perform the work and those people need “tools” to enable them to perform their jobs. Lastly, we need good “metrics” so we can manage and improve performance. It takes all four – in the right balance – to achieve optimal results.

The first steps in the typical support process model are intended to achieve service level goals (get the call or email to someone quickly). However, most of the remaining processes are related to ‘case resolution’. Achieving service level is a very important step. However, that effort is wasted if it is not backed up with a solid case resolution process. Answering the phone or responding to emails quickly is the foundation of good customer service and is required for total customer satisfaction. But that satisfaction will quickly turn to customer frustration unless we follow through. A solid case resolution process – including maximized ‘first contact resolution (FCR) –delivers high levels of customer satisfaction in a cost-effective manner.

Our ‘case resolution assessment program’ evaluates your process – end to end. We’ll identify strengths and weaknesses. We will analyze the data that is available and we will measure those factors that are currently not captured. We will benchmark the operation against similar companies and give you a ‘report card’ so you know where you stand. We will identify key opportunities to improve the efficiency and to increase customer satisfaction. We make specific recommendations and suggest hands-on actions that will improve performance. We will quantify those opportunities – predicting organizational performance and estimating the ROI if the recommendations are implemented. The result is a roadmap to world class performance.

### **Features & Benefits**

- Evaluate the current processes, people, tools, and metrics
- Benchmark your operation against a variety of industry data
- Identify gaps in performance and opportunities for improvement
  - Identify the root cause of any current problems and develop improvement plans
- Define a consistent and effective case handling and resolution process
  - Consistent with industry Best Practices
  - Compatible with industry benchmarking programs
- Quantify the opportunities
- Create roadmap to desired performance levels



## Key Activities & Deliverables

We have performed over 100 “assessments” for companies both large and small. We have a well defined methodology that delivers consistent results. We will...

- ✓ Perform a 15-point review of the current Case Resolution Process (CRP)
- ✓ Analyze current data/metrics related to CRP
- ✓ Recommend appropriate measurements for your environment
  - Define thresholds (e.g. FCR, Same-day, 3-day, etc.)
  - Define what is counted versus what is excluded (e.g. are ‘bugs’ to Dev excluded?)
  - Define/verify that proper ‘counting’ occurs (e.g. how do we measure/count FCR? What about re-opens?)
- ✓ Benchmark current performance versus appropriate industry comparables
- ✓ Develop recommendations for improving CRP
- ✓ Forecast performance and estimate benefits of implementing recommendations
  - Determine your ‘Case Resolution Potential’
  - Create a mathematical simulation to predict headcount/staffing impact
- ✓ Identify opportunities and strategies for improving the service delivery process
- ✓ Identify specific actions that will improve efficiency or effectiveness
  - Define escalation/actions @ various thresholds
  - Define communication to customer @ various thresholds
- ✓ Comprehensive written report includes findings, recommendations, and suggested roadmap to reach desired performance
- ✓ Includes an on-site presentation of our report and a working session to help you develop an improvement plan

**30-day, flat-fee (most situations).**

**You know what you’ll get, when, and for how much.**

**Contact us for a no obligation discussion and quote.**

**Still unsure? Ask to talk with past clients!**

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