



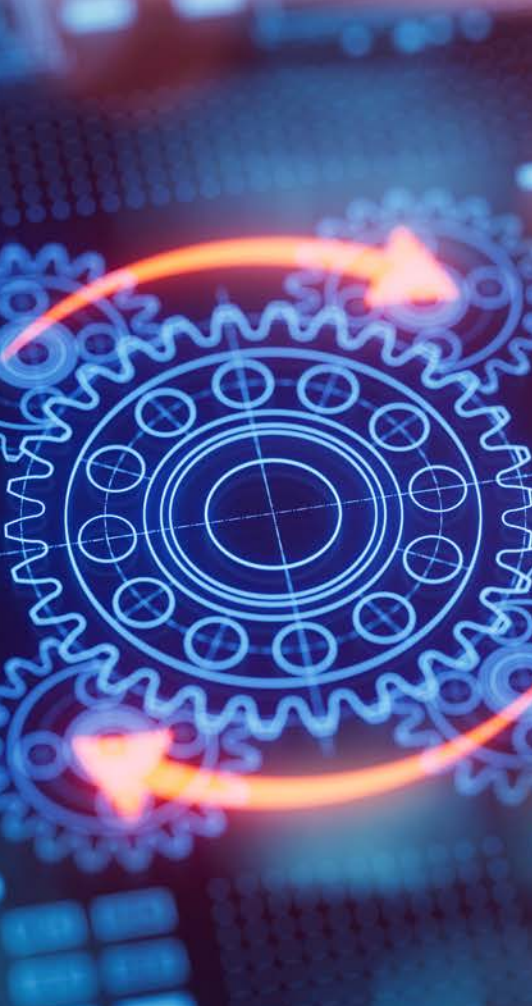
Case Study

Transforming Customer Data Management Processes to Reduce Wastages and Improve Customer Experience

Streamlined and standardized customer data collection to reduce send-backs and bottlenecks in customer onboarding and contract renewals.

Case Summary

SLK helped a Pennsylvania based manufacturing organization improve its overall customer data management practices and processes to increase accuracy and efficiency, reduce send-backs and bottlenecks, and deliver a better customer onboarding experience.



The Challenge

The client, a leading manufacturing entity based out of Pennsylvania, was dealing with a multi-step customer data collection and checks process. Each step in the process faced data-related issues that resulted in frequent send-backs for data collection and/or correction. This was required to manage the legal, regulatory compliance and risk profiling needs of the process.

This resulted in a slower-than-expected onboarding process and in turn, frequent customer queries on the progress. The client wanted to streamline and standardize the process to reduce customer send backs and risks associated with delayed onboarding.



The Solution

SLK helped the organization, identify key customer information & documentation required to onboard customers using a SharePoint solution. The online workflow form was designed and mandated to collect this key information. This ensured that critical information was always collected and send backs related to missing/incomplete information were eliminated in the data collection step, accelerating the onboarding process significantly.

Automation was also introduced with the solution to generate notifications on/after CRM profile creation and modifications and send these notifications to customer emails and phones. This led to a reduction in turnaround times (TAT) as well as a reduction in customer queries and consequent improvement in the customer onboarding experience.



Results

Business Impact

SLK's solution for customer data collection and management ensured that the collection process reduces upstream bottlenecks and that customers stay informed about their onboarding and/or renewal progress.

32%

Reduction in
send backs

78%

Improvement in
overall turnaround
time to onboard
customer

18%

Reduction in query
management queue for
customer get-backs on onboarding
status and contract renewals

Write to us at hello@slkgroup.com

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