



Customer Relationship Training

a SSE case study

Engaging the Mind...Improving Performance

Situation: A leading specialty finance company provides capital to security alarm dealers in 42 states. As a part of the financing operations, the company offers a wide range of services, including billing and collections. Using a web-based application, their clients (alarm dealers) can view, change and print reports on their customer's billing information while the finance company handles the day-to-day receivables management.

The company was faced with the daunting task of educating alarm dealers on the capabilities of their website and related applications. Due to a recent expansion in their customer base, their Dealer Services Unit was experiencing a dramatic increase in the number of calls regarding common website tasks and critical business processes at the company. Three (3) Dealer Services employees were taking approximately 200-300 calls per month, which are fairly lengthy in duration, the average being 12 minutes.

The company did not have any formal training in place for new clients or any official training materials. They were looking for on-demand, just in time training that could reach a diverse audience through assorted platforms. Two top requirements were that the solution should be easy to maintain by internal staff, and that it meet tight budget requirements.

Solution: SSE developed a context-sensitive online help system built in RoboHelp's WebHelp, which also contained information on the company's business processes, an FAQ page and a glossary of terms.

Through a series of three subject matter expert (SME) interviews, critical application screens and tasks were identified and frequently asked questions (FAQs) noted. The company's team provided a glossary, business process overviews and answers to the FAQ's.

Items with help screens were identified and a "help" icon placed next to that item with a link to the "help" content screen that calls that help screen. The Table of Contents was laid out parallel to the web site layout, with each main section giving information on each of the site's tabs. Information within those books was chunked and cross-referenced by screen and task.

In ten weeks SSE delivered a comprehensive help program and the code necessary for company web developers to integrate it into their web site. The solution was in on time and 13.5 percent under budget.

Results: The company gained a cost-effective way to educate their customers on the use of their website. Currently, due to the number of IT projects in progress at the company; the help content has not been fully integrated into the application as a context-sensitive solution. Still, the number of calls to the DSU has dropped approximately 80%. Their customers are very happy to have a solution to most of their problems at the click of a mouse.

For more information, contact info@SSEinc.com or call 888-875-6442