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Kevin McGee, Client Relations Manager, XRT



The Challenge: Deliver Top-notch, Cost-effective Customer Support

For more than 20 years, XRT has provided IT solutions and services to medium and large organizations in the financial sector. XRT solutions streamline cash, collection, liquidity, risks and payments-management processes through an integrated suite of applications and a common platform for multi-bank and multi-third-party communications.

Used by more than 7,000 companies in 55 countries, the company's Financial Value Chain solutions integrate with leading enterprise resource planning (ERP) systems and industry protocols to enable end-to-end, straight-through processing, online banking, and electronic payments around the globe.

XRT is committed to providing 100 percent customer satisfaction—truly high goals given the company's wide global reach. In order to handle customer cases more effectively without increasing its support staff, XRT demanded a powerful, Web-enabled support tool.

In 2003, XRT began searching for a new customer operation management solution. The company had two key requirements: The solution had to allow the U.S.-based and European subsidiary to work together in a real-time, cost-effective and seamless environment. Plus, it had to enable the company to deliver top-notch customer service around the clock.

The Solution: Neocase Customer Service

Recognizing that superior customer service is vital in the financial services market, XRT selected Neocase Customer Service over competing solutions such as Salesforce.com.

“XRT chose Neocase over Salesforce.com because of its robust set of collaborative capabilities combined with an intuitive, user-friendly interface,” said Kevin McGee, Client Relations Manager with XRT.

With Neocase Customer Service, agents have a tool that helps them to assess the nature of the problem more quickly. Neocase Customer Service guides them through simple troubleshooting tasks via an intuitive interface, which both minimizes the need for end-user training and supports widespread user adoption.

Superior workflow tools within Neocase Customer Service enable agents to escalate a case if needed, transferring a case to a higher level of support or urgency, or to a specialized XRT team.

AT A GLANCE:

Organization: XRT

Location: King of Prussia, Penn.

Industry: Finance

Challenge: Deliver high-quality, cost-effective support

Solution: Neocase Customer Service and Neocase Self-Service Portal

Results: Affordable, Web-based solution that supports superior customer service and streamlined collaboration across diverse teams and offices

For more information:

www.neocasesoftware.com

www.xrt.com

The Neocase solution also enables XRT to track all of its issues, saving time and money as the case moves up the service organization. The powerful database retains in-depth customer case histories, which service agents can review for deeper insight.

“Neocase provides all these great case-management features within an intuitive, easy-to-use environment,” added McGee.

XRT has been running Neocase Customer Service for more than two years. Management gives Neocase Customer Service high marks for integrating with ERP packages such as SAP; enabling collaboration between its dispersed, worldwide offices; and linking customers, partners, and customer service representatives around the clock.

The Result: Streamlined Collaboration and Superior Support

XRT found an affordable, easy-to-use, easy-to-deploy, and low-maintenance solution in Neocase Customer Service. And because it's Web-based, agents can access the tool anytime and anywhere.

Also crucial to a global company like XRT is Neocase's ability to facilitate collaboration across multiple parties, divisions, and offices—regardless of location and time zone.

“Thanks to Neocase, our U.S. customer support center can transfer requests to our European support centers seamlessly, without ever having to re-key data,” said McGee. “The Web-based application allows our teams in the U.S. and Europe to access the same, centralized, Web-based system, so we can more efficiently manage customer information.”

Neocase also delivers quality of service assurance through advanced visibility and reporting tools, ensuring that all of XRT's customers get the high level of service they expect.