

Neocase Makes Customer Service More Effective for IDSI

Challenges: Replace outdated case management system and manage increased volume of support cases.

International Decision Systems (IDSI) is the leading provider of asset finance origination and portfolio management software. For over 30 years it has offered an integrated solution from origination, throughout the asset management lifecycle, into disposition. IDSI customers include approximately 50% of the largest leasing companies in the U.S.

Like many others, IDSI was challenged with improving customer satisfaction ratings while facing increased support case volumes. If they hoped to maintain a high standard of customer service, they needed to improve their productivity, but with limited resources. The company was not in a position, however, to invest in new systems unless a new system could help them reduce overall costs.

IDSI needed to replace an outdated system for several reasons. The system's frequent failures had made it costly to maintain. Perhaps even more importantly, the older system supported only text-based information, and IDSI required more robust capabilities to support its newer, web-based products. In addition, the company needed a more powerful, web-based system and a centralized knowledge base for its expanding global presence. At the point that a change was considered, the budget for purchasing and implementation was limited.

Solution Requirements: Easily configurable, comprehensive customer support solution with integrated knowledge base and self-service portal.

After reviewing the strengths and weaknesses of their legacy system, IDSI knew what worked and what didn't work well for their environment. However, with their transition to hosted applications, changes in sales force, and expanding global presence, the company's requirements had changed over time. IDSI needed a powerful case management system that could support both internal and external customers as well as a wide range of products.

Defining the list of requirements proved challenging: "I was very strict with my teams on defining the requirements for what we needed in a solution," states Doug Schick, Director, Global Customer Support. "I wanted to make sure we defined it from where we wanted to go, not where we were now. Asking the organization to let go of sacred cows and do things differently was painful. I can tell you that there were some unhappy individuals when I threw out requirements they thought they needed because of existing processes."

After several months of research and analysis, IDSI defined the following list of requirements:

- > A global solution that performed well regardless of location.
- > A configurable hosted solution that did not require customization.
- > Ability to define service levels agreements and track associated metrics.
- > Integration with email for automatic case creation (with ability to attach documents).
- > Quick and easy access to metrics and dashboard functionality for agents and management



INTERNATIONAL
DECISION SYSTEMS®

AT A GLANCE:

Organization: International Decision Systems (IDSI)

Location: Minneapolis, MN (USA)

Industry: Equipment Finance & Leasing

Challenge: Replace outdated case management system and manage increased volume of support cases

Solution: Neocase Customer Service, Knowledge Base & Self Service

Results: Improved customer satisfaction; improved productivity of CS team; Lowered number of open cases

For more information:

www.neocasesoftware.com

www.idsgroup.com

"IDSI needed a technology that would support the right business processes, not just the old processes. We needed a system that could change and grow with us. I was really excited about what I saw with Neocase and its case management functionality. The system also had a self service portal and an integrated knowledge base; configurable out of the box with no customization needed."

Doug Schick
Director, Global Customer Support
International Decision Systems, Inc.

- > A robust knowledge base with convenient access to documentation and product information.
- > 24/7 assessible self service portal with integrated knowledge base.

The Solution: Neocase CS, Neocase KB & Neocase SF

IDSI needed a powerful, out-of-the box solution that was completely configurable; the company implemented over 100 seats of Neocase CS, and was able to easily integrate it with an existing third-party work order application. Neocase CS enabled IDSI to streamline and optimize business processes through the solution's workflow engine and intelligent case routing. It was also able to manage a myriad of service level agreements (SLAs) for different customers as well as be able to track work against them. Additionally, IDSI implemented automatic case creation from emails - a significant productivity booster for its customer support staff.

IDSI also elected to deploy Neocase Self Service and Knowledge Base, which uses an intuitive language search engine that uses "relevance scoring" to deliver more accurate content based on usability and user ratings. The Neocase Knowledge Base is seamlessly integrated with the case management system and self-service portal, allowing agents and customers, respectively, to share and access product details, support articles or other relevant information in an effortless manner. Moreover, the dashboards for tracking team and agent case distributions provide constant visibility as to the performance of the entire group.

According to IDSI, not only has the Neocase solution improved productivity within the organization but it has also made their customers and partners more efficient. The Self-Service Portal is integrated with Knowledge Base, which dramatically improves the accuracy of query results. Customers now have a single point of entry for all IDSI issues, which is important for a company whose customers often buy more than one product.

The Neocase solution was chosen for its advanced technology, in complement to the excellent services provided by the Neocase Professional Services team, as recognized by Doug: "Right from my request for a proposal, I received prompt service from Neocase, and that has never changed. They have been a fantastic partner through development, integration, launch and maintenance."

The Results: IDSI increases customer satisfaction without adding staff

- > **Reduced number of open cases with lapsed SLAs by 50%.**
- > Even after increased case volumes with the same number of staff, **customer satisfaction levels have improved.**
- > Team tracking through dashboards has led to an IDSI Incentive Program, contributing to **20% reduction in open cases in six months.**

Internally, IDSI enjoyed a number of important benefits using the Neocase system, namely: the company was able to remove operational and reporting silos between multiple product teams in Support and Development by integrating all systems with Neocase as a single point of contact.

Customer service agents are better able to manage their own lists, which has helped keep them motivated and on track. IDSI has seen high adoption rates of the Neocase Knowledge Base because its intuitive language search delivers more accurate and complete results. Productivity among IDSI customer service agents has improved dramatically because the Neocase solution is easy to use and cases are easier to manage.

IMPLEMENTATION FACTS:

- Agreement signing: End of September 2007.
- Implementation start date: October 2007.
- Deployment: 4 months.
- Implementation completed on a very limited budget.
- Converted 35,000 cases and 5,000 items from knowledge base.
- No customization required.

"The Neocase implementation team was fantastic! Information conversions often have hiccups, but it went very smoothly. And the process of setting up the SLAs, which can be very complicated, also went well. The Neocase team could not have been more knowledgeable and accommodating."

Doug Schick
Director, Global Customer Support
International Decision Systems, Inc.

For more information about Neocase, please visit:
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