

CORPTAX[®]

CORPTAX Achieves Remarkable Customer Support Results with Neocase Software

As business-to-business products have grown increasingly sophisticated and complex, customer support has also become more difficult. Issues are harder to resolve and take more expertise, which in turn puts pressure on support organizations. To meet SLAs and achieve goals for first-call resolution and customer satisfaction, B2B companies today need to provide their customers and support personnel with faster, easier access to knowledge and product information.

For CORPTAX, which develops tax software for corporate customers, providing better access to information and meeting its customer support goals meant several enhancements: consolidating its various support-related systems; providing an easy-to-use self service portal with access to a robust knowledge base, case management tools, and customer community; and using business intelligence to increase agent productivity and management visibility.

Challenge: Old Support System Marked by Inefficiencies and Delays

CORPTAX, Inc., based in Deerfield, Illinois, has been the leading provider of corporate tax software and services for over 30 years. Currently, nine of the top ten US companies and 50 percent of the companies in the FORTUNE 500 use at least one CORPTAX software product in their tax departments for state, federal, and international tax compliance.

CORPTAX helps customers with a highly complex business area: corporate tax law. It's also an area where companies cannot afford to make errors or miss deadlines. "There's a huge penalty if you don't file your taxes on time," says Lloyd Howlett, Vice President of Support & Customer Operations for CORPTAX. As a result, customer service and customer support are mission-critical - and CORPTAX is well aware that it needs to provide support to its corporate customers on *their* schedule. "Many of our customers work late hours as they approach their filing deadlines," says Howlett. "We wanted them to have the support resources they need to meet their deadlines."

At the same time, like any business that offers customer support, CORPTAX has always understood the importance of managing support costs - without jeopardizing customer satisfaction. The company wanted to reduce the number of customer calls by giving customers the ability to find answers on their own; and it wanted to increase productivity for support reps by streamlining business processes, by providing faster access to the right information. The solution was two-pronged: increase adoption of its self service customer support portal and enhance the ability of tier-one support staff to quickly and effectively answer customer inquiries.

To meet these objectives, CORPTAX knew it would need to upgrade its customer service technology. The company was using a set of disparate systems that weren't integrated, thus creating inefficiencies and delays for customers and support staff. And because the call-tracking system was based on a proprietary encoding of database tables and fields, data mining and custom, real-time reporting were extremely difficult. For example, CORPTAX was unable to generate reports in real time, which sharply limited the support organization's visibility into whether it was meeting SLAs. The company's knowledge base (KB) was also a pain point, according to Howlett. It had become "cluttered" with duplicate and outdated articles, a result of the way the system required a new KB article for every support case.

Results:

- 50% migration of inbound call and email volume to self service
- 12% reduction in cost of support services
- Increase from 43% to 51% for first-case resolution
- 5.7% increase in customer satisfaction to overall score of 92.8%
- Recipient of TSIA Support Staffing Excellence Award for customer satisfaction improvements

AT A GLANCE:

Organization: CORPTAX, Inc.

Headquarters: Deerfield, Illinois

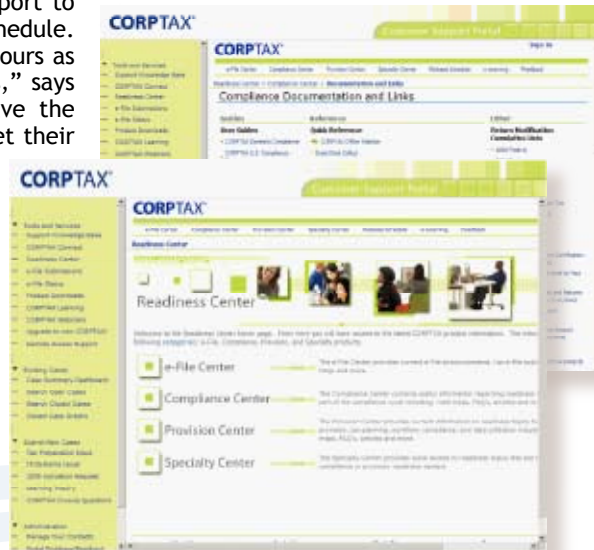
Industry: Financial services, technology

Challenge:

- Consolidate disparate customer service applications into one centralized solution
- Improve productivity for support team and empower them to do more with less
- Increase adoption of self service portal as the primary channel for customer support
- Gain better visibility into the customer service operations and use it to improve FCR and customer satisfaction

Solution:

- Neocase Customer Service
- Neocase Self Service
- Neocase Knowledge Base



Perhaps worst of all, CORPTAX felt that with the old system, its hands were tied: making changes would be costly and difficult. “With our previous system,” says Howlett, “we had customized so much that the cost would have been astronomical to go to their next version.” Meanwhile, resolution times suffered and adoption of the self service portal was well below what the company wanted.

Requirements: Reduce Load on Support Organization While Improving Agent Productivity

After considering the challenges it faced, CORPTAX defined four goals for its support organization.

- Consolidate its disparate legacy CRM, customer service, and bug-tracking applications into one centralized solution with single sign-on capabilities for customers and support personnel.
- Improve agent productivity and effectiveness in managing customer inquiries.
- Gain greater visibility into the customer service operations through extensive reporting and customized dashboards for agents, managers, and the executive team.
- Drive adoption of a robust, customizable self service portal as the primary communications channel for customer support, with a specific objective of migrating 50% of all customer inquiries to the portal.

By removing barriers to self service, the company would make it easier for customers (as well as support personnel) to access the support portal, knowledge base, case management, product information, learning opportunities, and CORPTAX Connect, its online customer community. “We were trying to make everything that the customer had to do available through self service,” Howlett says. Making self service appealing to customers would benefit CORPTAX too by reducing the load on its support organization.

Solution: Consolidated Resources with Advanced Support Capabilities

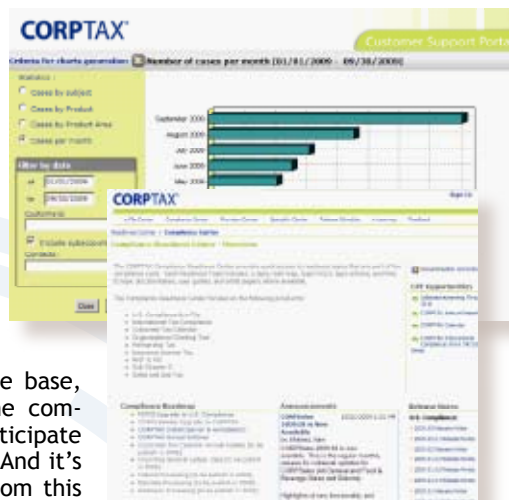
In January 2009, CORPTAX began its implementation of Neocase; just four months later, they launched on April 20, 2009. “We had a strong project team of internal resources and Neocase professionals,” Howlett says. “Their constant collaboration ensured a successful rapid deployment.” The CORPTAX solution consisted of Neocase Customer Service (CS), Neocase Self Service (SF), and Neocase Knowledge Base (KB).

Consolidation Provides Customers and Agents with a Single Go-To Source

The first task of the project team was to consolidate and integrate all support systems into Neocase CS supported by Neocase’s self service portal module, which would serve as an entry point for their customers into various resources such as customer community, knowledge base, and case management. Adding single sign-on made access to these resources seamless.

Now customers can quickly move from one resource to another and help themselves much more easily. If they don’t find what they’re looking for in the knowledge base, for example, they can turn to the online community, where they can ask questions, participate in discussions, and learn from their peers. And it’s not only customers who have benefited from this “one-stop shop” approach. Allowing customers to find answers fast reduces the volume of support cases they log.

The new system also gives customers greater visibility into the status of the support cases they do enter. “At any time, our customers can log onto the self service portal and review



Implementation Facts:

- Four-month implementation, completed in mid-April 2009
- Single sign-on with access to self service portal, knowledge base, case management, product information, learning opportunities, and an online customer community
- Built-in business intelligence, advanced reporting, and customizable dashboards enabling the support team to analyze, adjust, and work more cost effectively

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- LLOYD HOWLETT
Vice President of Support & Customer Operations
CORPTAX, Inc.

their case notes and any activity that’s happening with that case,” Howlett says. “They can see when it’s been moved from level one to level two, and they can see the notes that have transpired along the way.” They can also attach documents, screen shots, and a “wealth of other information” about what’s going on. Neocase maintains all related information within a single case and provides CORPTAX support personnel with one source to go to when working on an issue.

Business Intelligence and Real-Time Reporting Provide New Insight

CORPTAX has also benefited from built-in capabilities with Neocase that allow the company to do more with less. Business intelligence, advanced reporting, and customizable dashboards, for example, enable the CORPTAX support team to analyze, adjust, and work more cost effectively. “Report builder has been the real power in driving some of our analytics,” says Howlett. Managers use the dashboard feature extensively to quickly drill down for more information, he adds, “and they love it from the standpoint of having real-time information we couldn’t see before across all of our cases.”

The company uses the business intelligence capabilities in Neocase to drive revenue opportunities and save money. Neocase enables the company to identify the top calling customers, determine knowledge gaps, and offer targeted training - a win/win for both CORPTAX and its customers. One way that business intelligence saves the company is by allowing it to discover which issues generate the most support calls and then “push defects back to development,” says Howlett. Instead of generating an unending stream of support calls, problems can be fixed once and for all.



Knowledge Base Serves Up Targeted, Relevant Content

Neocase KB has been one of the more important tools for the CORPTAX support team and its customers. “The focus has really been to make it easy to find answers,” says Howlett. “We’re driving efficiency by enabling users to find articles that solve their problem before they’re contacted by us.”

With powerful search capabilities and a relevancy scoring system, Neocase Knowledge Base provides customers and support personnel with searches results that are precise and targeted. Whereas a typical search with the old system might have returned 1,600 articles, now “you can use the additional elements and parameters of a search with Neocase and narrow that down to a list of six,” Howlett says.

“A customer is not going to look through a list of 1,600 items,” he continues; “they’re just going to enter a case. But with a list of six, they’ll scan the articles.” Each article also includes a relevancy score assigned by Neocase KB, indicating which one is most likely to contain the information the user is looking for. In addition to articles, the company can now include rich content in the search results, displaying videos and demos that help customers solve complex tax problems even faster. A recommendation engine further aids users by proactively suggesting articles based on contextual information. As a result, customers can often find answers on their own and avoid creating a new support case in the first place.

As CORPTAX has demonstrated, giving customers access to an effective, integrated knowledge base can prevent a significant volume of questions from ever reaching tier-one support, thereby reducing overall costs incurred. And to answer those questions that are logged, support personnel use the same knowledge base. When an agent finds the answer to a support question using Neocase KB, he or she can click a button to attach that article to the support case and send it to the customer via email.

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Business Process Management Helps Company Meet SLAs

To ensure that every customer inquiry is followed up promptly - and inquiries do not slip through the cracks - CORPTAX support personnel count on business process management (BPM) built into Neocase CS. BPM rules determine when an escalation email is sent and to whom, ensuring that as deadlines approach issues are escalated appropriately. For example, when a problem requires help by the development team, a detailed email is automatically generated and sent to that team. If a response hasn't been received by the expected deadline, the system sends a notification to the support rep, who can follow up with the development team.

By identifying issues that need to be addressed before they become serious problems, says Howlett, "we can make sure we're achieving those service-level requirements we set up with our customers." Since deploying Neocase, CORPTAX has increased its SLA achievement from 94% to 97% with an overall improvement to customer satisfaction.

Results: Adoption of Self Service at Twice Industry Average

Neocase has enabled CORPTAX to far exceed the industry average for self service adoption, which typically runs around 40% for enterprise support, according to John Ragsdale, VP of Technology Research at Technology Services Industry Association (TSIA). In fact, CORPTAX has achieved a 69% adoption rate for its self service support portal, about twice the industry average. In 2010, CORPTAX received the TSIA Support Staffing Excellence Center Award for achieving a 5.7% increase in customer satisfaction to 92.8% overall.

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The company was also able to improve its rate of resolving cases within 24 hours, jumping from 49% to 75% (compared to an industry average of 57% for enterprise support). Remarkably, CORPTAX has been able to achieve these improvements and increase its customer satisfaction rate while reducing support staff costs by 12%. The greatly improved self service portal with robust knowledge base and a more productive tier-one support staff have been central to these results.

Largely due to the advanced capabilities Neocase has given CORPTAX, the support organization has gone from reactive to proactive, from focusing on problems to finding new ways to generate revenue and manage product development. "Neocase will empower us to move to the next level of customer satisfaction and retention," says Howlett. In addition to realizing a substantial increase in the productivity of customer service staff and accomplishing self service objectives "in a very short time," says Howlett, "Neocase provided us with a solution that enables delivery of superior customer service above our competition."

"CORPTAX is the 2009 TSIA Support Staff Excellence Award Winner. We are very proud of that."

- LLOYD HOWLETT

Vice President of
Support & Customer
Operations

CORPTAX, Inc.

For more information about Neocase, please visit: www.neocasesoftware.com or email: info@neocasesoftware.com.