

Case Study

Business Process Solutions
Corptax



Jeremy Stephens, CPA
Manager of Analytics, Customer
Operations, Corptax

“MHI Global’s courses have helped us turn the corner and regularly exceed our customers’ expectations. It took a lot of what our agents knew and gave it more structure to help them connect the dots of cause and effect—not only in how we solve problems but in how we interact with our customers and with other departments internally. Communication between departments has definitely improved as has our relationships with our customers.”

Improving Customer Satisfaction

Situation

Corptax, the leading provider of corporate tax software, was spun off from a large accounting firm. Shortly after the spinoff, a survey showed that customers were dissatisfied with the support they received. Adding to the problem was the loss of a number of experienced staff members who returned to the prestige of one of the “Big 4” CPA firms. Lloyd Howlett, VP of Support and Customer Operations at Corptax and Jeremy Stephens, Manager of Analytics, Customer Operations, were determined to improve the skills and attitude of the remaining support reps and the satisfaction of their customer base.

Action Taken

In addition to changing technology tools and redesigning processes to better serve customers, Corptax took part in TSIA’s Support Staff Excellence (SSE) program. Using programs developed by TSIA’s partner, MHI Global, Corptax trained their agents in effective communication and problem solving skills and taught managers how to reinforce learning on the job. As a result of their achievements through the SSE program, Corptax achieved the “Certified Support Staff Excellence Center” Level 1 designation. Corptax reps then completed MHI Global’s diagnostic troubleshooting coursework and received the “Certified Support Staff Excellence Center” Level 2 designation.

One challenge Corptax faced during this process was that 50% of their staff were remote, home-based agents. To overcome this challenge, core learning was delivered through online modules with follow-up classroom sessions. For the Level 1 classroom follow-up, agents traveled to Corptax headquarters. Half of the agents attended training while the other half supported customers. For the Level 2 training, Stephens developed follow-up webinars to save on travel costs.

Today, agents meet individually with their coaches every two weeks to review key learning points from the training. The center features rotating posters illustrating points of the program to help keep the learning fresh.



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Results

In approximately two years, and with 94% of their staff- trained, Corptax has achieved the following results:

- Customer satisfaction scores have risen from below 80% to above 97%
- Timeliness has increased from 87% to 96%
- Service quality has increased from 88% to 97%
- Courtesy scores have risen from 93% to 98%
- First call resolution rates have risen from 29% to 52%
- Calls resolved in 24 hours have increased 53%

In addition, the individual certification employees received as they completed SSE coursework and testing made them feel more professional. They now take greater pride in their role of support representative and as a result, turnover has decreased. As of this year, Corptax has received seven consecutive Certified Support Staff Excellence Awards from TSIA.