Customer Service Significantly Improved for Clients of Service Payment Plan

Thorough research and partnering with an experienced provider make SPP's technology investment a great success

Service Payment Plan, Inc. is a privately held Chicago-based financial services corporation where great customer service is a necessity.

SPP knows customers don't appreciate is being put on-hold for lengthy amounts of time or waiting for a call back after calling in with an inquiry about a contract. This is why – in an effort to improve customer service, reduce costs, and improve overall office efficiency – SPP decided to evaluate implementing an Enterprise Content Management (ECM) system.

Deciding they needed a system to manage their business critical content was the easy part. SPP knew they had hard work in front of them "doing their homework" before diving into this project. Their learning process started with contacting other business partners who had implemented ECM systems. The team was then able to see a handful of these systems "live and in-action." SPP also attended the annual AIIM (the Association for Information and Image Management) conference where they learned more about ECM, were able to get a high-level idea of what they were looking for and had the opportunity to meet several technology manufacturers. These vendors then provided the name of certified partners who could help design and implement these types of solutions. One of the partners that was recommended by several ECM vendors was IDT, located in Itasca, Illinois.

Upon returning from the show, SPP went through the process of evaluating the recommended partners. Ultimately, they chose to work with IDT because of the depth and breadth of their ECM experience and the services offered. SPP was impressed by the knowledge of the IDT staff and felt they had made the right decision in choosing them as the best team for the job. In October of 2004, SPP and IDT began the implementation of the new ECM system.

Service Payment Plan's ECM System Components include:

Scanners-
Bell & Howell 8080D
Fujitsu 5750

Document Capture-
Kofax Ascent Capture

Search & Retrieval-
Stellent Workgroup Fixed Content Management Software

Paul Radja, SPP's Chief Technology Officer, says of getting the project approved by the SPP management team: "Of course – as with any big technology investment – there was still a lot of 'nail-biting' that went on before making the leap – regardless of our research, evaluations, return-on-investment projections and the like. However, the SPP management team was ready to move forward with confidence because they felt that IDT had the knowledge and experience to get us up and running smoothly. They were certain that the team at IDT had a thorough understanding of the products they represented and had helped us to select the right system components that would work the best for SPP's needs."

Before implementing their ECM solution from IDT, SPP was a very paper intensive office. If a customer called with a question that required looking at their actual contract, the customer service representative would have to manually search through hard copy files, pull the correct one, then go and call the customer back. This process was taking too long and was frustrating to the customers that had to wait for a call back or sit through an extended "on-hold" time before getting an answer to their question.

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Now, SPP representatives have the ability to do keyword searches for documents right from their desktops. This has cut response time dramatically. Incoming inquiries can now be handled on the originating call without the long wait or calls back. According to Radja, this has been the biggest benefit of their system. Not only are their employees happy to be able to get things done in a much easier way, customers are also pleased with the high level of service they are receiving.

Other key benefits of SPP's content management system include:

- **Speeding up of the data entry process** by providing key-from-image functionality for handwritten forms and utilizing Optical Character Recognition (OCR) and Optical Mark Recognition (OMR) technology for standard, typed forms.

- **Streamlining the customer service process** by providing CSR's with the ability to instantaneously view the imaged payment plan or warranty and support documentation directly from the ASP or Stellent interface.

- **Freeing valuable employee resources** to focus on value-creating activities by eliminating wasteful and tedious paper management tasks.

- **Laying the foundation for future process improvements** by providing an infrastructure to which SPP can add additional departments and applications for a relatively low cost.

- **Ensuring the integrity of content** in the event of user error, natural disaster or other catastrophic events.

"It has worked out really well" says Radja of their ECM solution and their relationship with IDT. "Their body of knowledge about several products was key in finding just the right solution for our business. While their breadth and depth of knowledge, products and services was at first beneficial, it is now crucial to our projects continued success."

Looking toward the future, SPP plans to expand their solution to other areas of their business. At the conclusion of this year they will complete their "State of Technology" for the company. After seeing the hard ROI figures and other quantified benefits, Radja is confident that the existing system will be extended to other departments throughout the company so they, too, can reap the benefits of an enterprise content management solution.

As for other companies considering implementing an ECM system, Radja and his team offer the following advice – "Know that it is going to be difficult to make the leap to jump in. Do your research. Get a high-level idea of what you're looking for. Try to see other systems in action. Most importantly, find the right vendor. You can't be successful with the best technology if you have the worst vendor. But, you also can't be successful with the best vendor and the worst technology. You've got to take the time to find that important combination of a great vendor who also has knowledge and experience with several systems and products. That vendor is going to be a technology partner who is able to get the best system for your company's specific requirements and ensure your project's success."

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IDT, Inc. (www.idt-inc.com) helps mid-market firms achieve maximum efficiency through enterprise content management, workflow automation, records management, ERP, CRM and line-of-business solutions. From IDT Complete™, which enables customers to achieve both efficiency and compliance by integrating their ECM and ERP systems, to pre-engineered IDT Pilot Packs™ that ensure quick return-on-investment with ECM, IDT uses phased and flexible integration of industry leading software applications to place the power of scalable systems at the client's fingertips. Since 1992, IDT has provided a single-source knowledge base for system design, integration, customization and long-term support.