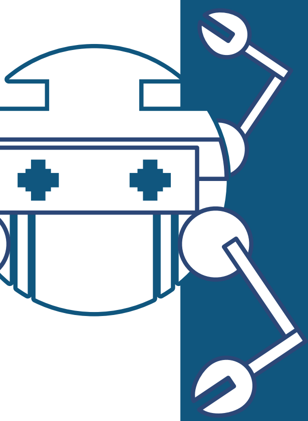

HOW A SELF-SERVICE APP IMPROVED CLIENT EXPERIENCE FOR A PROFESSIONAL SERVICES ORGANIZATION

In this case study, we discuss how Nablasol helped an organization in the tax-related professional services industry add an edge to their client's experience.

KEY METRIC

Clients were updated about their case real-time, preventing backlog of any kind.

Uniform case-related communication

SUMMARY

In today's customer-centric landscape, companies cannot afford to relegate customer service to a secondary consideration. While many businesses focus on digital touchpoints leading up to a prospect becoming a client, they often overlook the potential of enhancing the digital touchpoints for their existing clients, which can significantly elevate their overall experience with the organization. This case study illustrates how Nablasol effectively enhanced the client experience for an organization operating in the tax-related professional services industry.

BUSINESS CHALLENGES

In the realm of professional services, client servicing often involves labor-intensive procedures.

To ensure a successful outcome, the following priorities were established:

- Establishing regular and punctual client interactions to provide updates on service status.
- Managing document-intensive processes by meticulously tracking submissions and follow-ups on document requests.
- Addressing clients' document access needs efficiently, reducing reliance on time-consuming representative interactions.
- Given the extended payment plans, providing additional servicing to ensure timely payment method updates.

Centralised repository for clients to access at any time

Real-time updates and alerts about cases

Uniform case-related communication

SOLUTION PROVIDED

We developed a digital self-service platform for the organization's clients, empowering them to efficiently complete common tasks through a dedicated mobile application available on both iOS and Android platforms. Additionally, a web version was designed to cater to clients who preferred desktop access or opted not to download the app.

The client application offered users the capability to:

- Receive real-time updates from their assigned professionals regarding service status and promptly address any issues or requests.
- Seamlessly upload necessary documents required for services and manage previously submitted documents conveniently.
- Maintain a centralized repository for all their tax-related documents, ensuring anytime accessibility.
- Receive timely alerts pertaining to upcoming deadlines, valuable insights, or actions initiated on their accounts.
- Effortlessly manage and update their billing profiles, ensuring up-to-date information and preventing service interruptions.

This client application was intricately integrated with the organization's CRM and Document Management System, guaranteeing clients access to the most current information. Additionally, internal workflows and tools were devised to manage client interactions within the app and provide them with regular updates.

IMPACT ON BUSINESS

The application substantially enhanced the client's experience with the organization:

- Over 60% of clients reported the application's usefulness, according to feedback gathered post-service completion.
- Notably, there was a marked decrease in the volume of routine client servicing requests.
- Additionally, a considerable proportion of clients continued to engage with the app even after the completion of their services, making use of various other valuable features it offered.

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