

SOMETHING TO WRITE HOME ABOUT

A company overhauls its customer correspondence library and creates raving fans as a result.

The customer service center of a large financial services company was drowning in a sea of correspondence templates. Accumulated over many years, these letters now formed an enormous and complex template library that confused employees and customers alike. Things had gotten out of hand.

About the Profiled Company

This Fortune 100 firm is a leading diversified financial services provider with over \$500 billion in assets and operations that span the globe.

The Challenge

Developed by many people over many years, these correspondence templates lacked a consistent tone, language, look and feel. They weren't well categorized, so service staff had to painstakingly sift through hundreds of templates to find the right one for each circumstance. And the letters weren't just a burden for employees. Riddled with technical terms, jargon and poor grammar, the correspondence made the company look unprofessional – and triggered many phone calls from frustrated customers who simply couldn't understand what the company was communicating.

The Solution

Watermark inventoried every letter in use, categorizing them by audience and subject matter. Duplicative letters were targeted for elimination or consolidation, significantly reducing the size of the template inventory. The remaining letters were simplified and streamlined into more consistent and customer-friendly formats. To maintain the integrity of the new library, correspondence design guidelines were developed, helping ensure that future templates would embody the same look and feel. Lastly, a new automated correspondence generator was deployed, making it far easier for service staff to find and generate the right letter at the right time.

Among the services provided by Watermark were:

- **Information architecture** to create a more intuitive and better organized template library.
- **Correspondence development** to improve the look, feel and content of the letters.
- **Simplification** to make the letters easier for customers to understand.
- **Workplace improvement** via the design of a user-friendly correspondence generator.

The Results

The company realized many benefits by partnering with Watermark on this project:

- **Productivity rose.** The streamlined template library – coupled with a new letter generation system – enabled staff to spend less time searching for and creating letters.
- **Quality improved.** The professionalism of correspondence improved dramatically, as service representatives relied more frequently on the new standardized templates.
- **Call volumes declined.** With simplified language, the new letters triggered fewer follow-up calls from customers, driving down call volumes and reducing operating expenses.
- **Customer satisfaction soared.** The company achieved its highest customer satisfaction scores ever, driven in part by a correspondence makeover that turned routine communications into crowd pleasers.

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