



## Case Study: Customer Retention

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The client is a premier provider of identity theft, privacy and consumer protection services and partners with the country's top financial institutions to offer its products. Synergy Solutions provides inbound and outbound call center services for this client and has done so since 2002. Our services include outbound sales to existing customers, inbound up-sells, inbound data breach response handling and inbound retention (save a member) calls. This study specifically highlights an inbound retention program in which Synergy's goal was to retain the customers that called in to cancel the client's product. The client's goal was to replace their current vendor that was underperforming and they began outsourcing a portion of these calls to Synergy in June 2008.

The client's goals were for Synergy Solutions to match service levels achieved at its internal sites within six months and to provide stronger support from a retention and staffing perspective than they were receiving from another outsourced provider.

Synergy Solutions went live on the program in June 2008 with 56 FTE. As CSRs (Customer Service Representatives) on this program would be required to access highly sensitive data, Synergy enforced strict security measures including physically isolating the team dedicated to this program with security walls, cameras and separate work-space. Synergy launched an extensive recruiting process, which included multi-staged interviews and extensive background checks.

CSRs hired for this program participated in Synergy Solutions' employment training program, followed by ten days of in-depth product training designed to meet the client's goals. This customized training curriculum was designed to educate Synergy CSRs to master essential company information and industry knowledge to succeed as Credit

Education Specialists and complete assigned activities to gain the skill, knowledge and experiences expected. In addition to educating consumers on the product benefits and encouraging usage, Synergy CSRs were expected to explain the purposes of the Equal Credit Opportunity Act and the Fair Credit Reporting Act and who each act governs.

As Synergy continued through its ramp up and increased the number of FTE assigned to the program, it has completed multiple new hire training classes to accommodate this growth.

Synergy Solutions adopted the client's commitment to their customers, their customers' expectations and standards of excellence. Synergy CSRs provided superior customer service by utilizing words and phrases that establish a positive perception and confidence and help ensure a delightful customer experience. In addition to customer retention and cross-sells, Synergy CSRs were held accountable for educating customers on what ID Theft is and how it can happen and what customers can do to help prevent it from happening.

Synergy Solutions demonstrated our commitment to customer service during the launch of this program. In addition to the client's team, Synergy had a strong management team on side during the launch, which contributed to an accelerated learning curve.

Quality was paramount to the client. Two client monitoring sessions were held each week and each CSR was monitored daily with two weekly completed evaluations in which each agent must have scored a certain percentage to order to pass.

Synergy shares our client's commitment to conservation and the environment and our efforts reinforced the client's Green Positioning initiative. Synergy CSRs encouraged members to receive their fulfillment and membership materials and credit scores in a secure environment online rather than by mail. Synergy CSRs educated members on the features and benefits of the client's website and the resources and tools that are available online.

The client measured Synergy Solutions against performance of their internal and outsourced call center. Within one month after launch, the client was able to eliminate their other outsourced call center and within five months after launch, Synergy had exceeded the performance goals and consistently has met and/or exceeded the performance of the client's internal call centers.



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