

Streamlining Client Service

Acquis designs the ideal future state client service process for a local chapter of one of the nation's largest nonprofit organizations.

Challenge

The largest chapter of one of the nation's most recognized nonprofit organizations, whose primary objective is to provide assistance to those affected by disasters, was experiencing issues with their Siebel platform, which the organization was using to capture client data. The initial implementation of Siebel had been implemented too quickly and without input from key stakeholders, thus the tool had issues with missing, incorrect, and incomplete data. This inadequate data was not allowing users to effectively analyze and report against the successes that the local chapter had been seeing for so long. Further, key executives were unable to use the system to report accurate financials to the national organization.

The client needed to:

- Simplify client service processes as it related to using the application.
- Optimize the capabilities of Siebel to increase efficiency and accuracy.
- Revisit reporting abilities across key executives.

Collaborative Approach

Understanding the effort would involve more than just a Siebel redesign to address the various data challenges. Acquis key activities included:

- Conducting interviews with each department to understand how data was being collected, aggregated, managed, and reported.
- Facilitating meetings with personnel from varying levels of the organization (directors to line managers to front-line employees) to gain a true understanding of the gaps in the system and the system knowledge of employees across the organization.
- Conducting process audits to validate the extent of the problem across numerous data elements within critical processes.

Drive Change

Acquis was successful in both helping the client adjust its processes to better serve its employees, as well as to help redesign their selected tool to serve the needs of executives and employees alike.

- Identified specific changes to the Siebel user interface.
- Restructured responsibilities and functions to eliminate redundant work effort between departments.
- Reduced processing time and confusion about data ownership.
- Facilitated a positive change in employee perception of senior management's dedication to operational excellence.

About Acquis

Acquis is a consulting firm specializing in strategy and implementation. We help ambitious organizations solve business challenges that enable sustainable growth and healthy efficiency. We do this by not just designing strategies but also putting them to work.

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