



CASE STUDY

Client Services, Inc.

The Business Challenge

Client Services, Inc. is a full service receivables management and customer care provider. They offer a diverse selection of programs, from first party/early state recovery, to third part/post charge-off recovery, along with a variety of customer care management solutions. The CSI brand is recognized around the globe as a superior recovery partner that has been honored by many of America's largest corporations as a best performing partner.

Being a heavily service-focused company, it was imperative to the Client Services team to improve efficiencies and reduce cost without compromising their exceptional customer service. CSI was experiencing delays and bottlenecks with their internal document distribution process and wanted to streamline the timely delivery of accurate information. In addition to challenges with the distribution process, CSI knew their paper consumption and associated expenses were continuing to escalate, and making it difficult to stay competitive. CSI needed to find a more economical and green solution to the amount of paper being utilized throughout the organization. A third focal area for Client Services was the labor-intensive, client audit process. CSI set a goal to reduce, the number of staff hours spent on audits.



"The transition from paper based business processes to automated content management business processes with OnBase has allowed CSI to meet and in most cases exceed in satisfying the ever increasing regulatory requirements from our Clients and government entities while providing a good return on investment and keeping headcount static."

— MONT LITTLE | CIO, CLIENT SERVICES, INC.

The Solution

Due to the ease of configuration of the OnBase system and the ability to integrate with other external applications as well as internal systems, CSI invested in OnBase in 2008 initially targeting the Clerical and Bookkeeping areas. However, in 2010 when the Business Technology department launched an initiative to reduce the amount of paper being created during the day-to-day business operations, CSI really began to see the value of their investment.

With a combined solution including Kofax Capture and OnBase, the Business Technology team focused primarily on the back office operations (bookkeeping, clerical, mail room) but quickly expanded the project to include document distribution and tracking throughout their nationwide call centers and simplifying the client audit process.

The Outcome

\$137K
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IMMEDIATE HARD & SOFT ROI RESULTS

In the first three months, CSI eliminated \$137,000 of expenses associated with their original paper reduction initiative in the back office.



INCREASED EFFICIENCY & SIMPLIFIED COMPLIANCE

CSI achieved two of their primary goals—reducing time and increase accuracies in their document distribution process, enabling them to get the right information in the right hands quicker. In addition, audit compliance has been simplified and response time to audit requests have been expedited.



INCREASED ACCESS TO INFORMATION AND EXCELLENT CUSTOMER SERVICE

Streamlining and electronically driving the routing and approval process has led to less manual intervention, reduction in errors and delays and has simplified the training process as they expand.



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Recent Developments

CONSUMER COMPLAINT TRACKING

New compliance needs arose from the Consumer Financial Protection Bureau on documenting & tracking complaints, responses, etc. regarding collections activity. An OnBase E-Form was initially in use, but CSI realized that OnBase WorkView was better suited to show all pieces related to a complaint case.

After a brief evaluation of WorkView and a successful proof of concept effort, a new solution was developed for the CSI Consumer Affairs department. The new WorkView application has been rolled out and was very well received. Further refinements are expected with added value for Consumer Affairs compliance efforts.

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