

Objective

A growing home inspection company desired to build out their customer care team before the start of their busy season.

Challenge

Customer care was currently being handled by a key member of the organization's leadership team who was too busy with other responsibilities to create the necessary documentation to hire or train new employees. Additionally, previous new-hire training had been conducted in person. Without written instructions, it was all but impossible to onboard new staff remotely during COVID19 pandemic,

Solution

The company used several different technology platforms to schedule different inspection services as well as manage their own customer interactions. Through screen share meetings with the Customer Care Manager walking me click-by-click through her workflow, I documented each step in the process of scheduling services and serving customers.

Throughout the project, it became increasingly evident that what the Customer Care Manager saw as one role/workstream was actually four workstreams.

Results

Created end-to-end series of SOPs for the Customer Care role

Created reference documents, including escalation grid and customer care guidelines

Created high level documentation of three other workstreams that were being handled by a single person

Advised client on how to better manage service delivery issues from one of their vendors

Provided a vendor management strategy



Tammy Olson

www.nwvirtualsolutions.com

www.linkedin.com/in/tamaraolson10