



Success Story: Workflow Analysis and Recommendations for Improvement

Summary:

TerpSys[®] conducted a customer service-focused review of workflow processes for a client with internal teams that interact with developers of low-income housing.

Client: Low-Income Housing Syndicator

A division of a major financial organization that funds developers of low-income housing projects, the client provides dependable, attractive returns to investors through the syndication of the low-income housing tax credits.



Objectives:

- Identify ways to simplify workflow process for developer-facing operations
- Recommend removal or consolidation of redundant documents and tools
- Suggest improvements to existing workflow management and information systems
- Propose organizational changes to promote more efficient workflows
- Identify business and functional risks posed by new process

Challenge

The client had recently launched a customer service initiative focused on private-sector developers of affordable housing projects. A variety of anecdotal experiences of the organization's leaders suggested that the industry-wide level of customer service – and the quality of the customer experience – was poor and that customer expectations were low.

Generally, Low Income Housing Tax Credit syndicators have not used customer service quality as an intentional market differentiator. Thus, the motivation for the client's workflow process review was to apply the high level goals of its customer service initiative on a practical, workflow level.

The ultimate hope was to improve the client's capability for attracting and retaining a larger base of developer customers by serving them more effectively.

Solution

Our team interviewed the client and several of its developer customers to identify the current state of team roles, systems used, and processes. We then documented each key process from both customer and internal client perspectives. Working with the client, we defined a desired customer experience with seven distinct areas, duly noting any gaps between that "ideal" experience and current conditions.

With the gaps identified, we developed high-level recommendations to close each of them. We then thoroughly documented those recommendations rated the highest priority by the client. In general, these were items with the greatest potential for making a positive impact on the customer experience, including external-and-internal-facing process changes.

The TerpSys team developed a full report containing all findings and recommendations, including strategic decision points and "next steps" to help it address its customers' greatest needs.

Results

- Recommendations and report have had an immediate, positive impact on client operations
- Implementation of streamlined processes promises to significantly enhance customer experience
- Client is on course to be recognized as an industry leader in customer service quality

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