



# CASE STUDY

## FINANCIAL SECTOR

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### CUSTOMER PROFILE

- Financial services arm of truck manufacturer; offers purchase and lease plans
- Serves owners/operators, fleet operators, CSRs and dealerships according to their individualised needs

## Executive Summary

This financing company needed to serve every customer to assure satisfaction and long-term retention.

Online self-service capabilities offered by the Pitney Bowes EngageOne Liaison™ solution provided a cost-effective way to engage with every customer. The solution allowed the financing company to identify critical service needs early on and respond in a timely fashion. EngageOne Liaison™ improved customer satisfaction and helped to build customer loyalty at a significantly lower cost than traditional phone services.

EngageOne Liaison™ can be easily updated, this firm can continue to add services to remain ahead of industry standards for customer service.

## Business Challenge

Faced with an abundance of customers, products and cultures, the company found it hard to connect with every customer in a relevant way. It could only afford to focus long-term retention efforts on its largest clients—those that justified a dedicated account manager.

*EngageOne Liaison™ improved customer satisfaction and helped to build customer loyalty at a significantly lower cost than traditional phone services.*

## Solution

This financing company instituted EngageOne Liaison™ with electronic bill presentment, payment, self-service, billing, mobile and customer care capabilities. The solution delivered a competitive advantage with better customer satisfaction, enhanced customer loyalty and lower costs.

With EngageOne Liaison™, the company now has a clear, current, consolidated picture of its accounts. It can also address customer issues from any place. This has helped it to overcome limitations imposed by phone queries and wait times during business hours, resulting in improved customer satisfaction.

EngageOne Liaison™ has helped to build long-term customer loyalty by providing a platform for implementing segmented marketing campaigns and establishing communities of interest.

A better-than-paper interactive bill, streamlined payments, and online solution to facilitate customer queries (e.g., billing and payment issues, payoff quotes, tax forms and contract reviews), have all contributed to a reduced service delivery cost.

## CASE STUDY

### TECHNOLOGY USED

- EngageOne Liaison™ self-service solution for integrating personalised document creation and high-performance archive and retrieval capabilities

### Results and Benefits

**“On the road” customers have up-to-date, consolidated account information—anytime, anywhere—for easier billing and account management.**

**The ability to deploy segment-driven marketing and establish communities of interest builds long-term loyalty with accounts of all sizes.**

**Interactive bills, streamlined payments and online access result in fewer phone queries and reduced customer service costs.**

*With EngageOne Liaison™, the company now has a clear, current, consolidated picture of all its accounts.*

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