

**Solving the Challenges
of Email Management in
a Shared Services
Center**



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INTRODUCTION

Do you use email as a communications channel in your shared services center? If your shared services operations are like most, email requests are a significant percentage of all contacts. ScottMadden has seen companies report up to 30% of contacts via this channel.

We believe shared service organizations (SSOs) can significantly improve service while reducing costs by decreasing reliance on an email communication channel.

THE CHALLENGE

Email as a request channel can be challenging from a number of perspectives, including:

- Customers submit requests with incomplete information requiring follow-up communications
- SSOs employ additional staff to read, parse, and assign emails
- Service organizations have increased difficulty maintaining visibility of all communications related to each request
- Added time is required to complete service because of repetitive email exchanges
- Email content can be exposed on the internet increasing security risks

However, email has its advantages, including:

- Clients can send email requests around the clock from anywhere in the world
- Email does not require that anyone be present to receive the email at the time of sending
- Requests are recorded in writing and can provide partial requester authentication

THE SOLUTION

ScottMadden recommends that SSOs replace email channels with more efficient, effective means of receiving and processing requests. Self-service requests through case management systems (CMSs) and judicious use of phone systems can significantly improve performance over traditional email communications.

Self-service CMSs via portal or mobile devices offer significant advantages:

- Portals/mobile devices can be used to make and route requests to the correct application or servicing group within the service delivery model
- Customers can categorize issues for assignment and resolution
- Forms and templates guide customers on all data/information required for each type of service
- Customers can attach supporting documents directly to cases for validation
- Customers and service providers can use integrated mobile applications for on-the-fly submission, approval, or review of service requests

- Customers and service providers can reference all communications related to each request in one place
- Customers can access guidance and policies related to requests through an integrated, searchable knowledgebase (depending on application set-up)
- All substantive communications and information is maintained within the CMS providing enhanced security

CMSs provide the ideal interface between customers and service providers, but some customers may require assisted service via phones. Interactive voice response (IVR) systems increasingly use data to readily identify and verify customers and quickly connect them to servicing groups. Despite seeming “old school,” ScottMadden believes phones offer advantages over email communications. Some advantages include:

- Most users have access to personal or company phones to utilize assisted service channels
- Two-way dialogue between a customer and service representative can facilitate collection of all information to complete service in one contact
- Combinations of phone numbers and personally distinct information can be used to verify identities of customers
- Related contextual data can be used by IVRs to automatically route callers to the appropriate service providers and to query relevant guidance and policies
- SSOs can use identifying data and recordings to satisfy audit requirements

MAKING THE SHIFT AWAY FROM EMAIL HAPPEN

To replace email as a primary channel for service requests and communications, SSOs must address the three key aspects of any significant change initiative—technologies, processes, and people.

Technologies

Technology vendors continue to develop and improve case management applications. Many have robust case management functionality as well as integrated portals, mobile apps, work flow, and chat capabilities. Some examples of vendors that could be considered include:

- Salesforce.com
- RightNow
- Neocase
- ServiceNow
- Infor
- Dovetail

Processes

Eliminating email as a primary service channel will require process changes. Firstly, the elimination of email for request submittal will require customers to submit requests through the portal or mobile app via case management self-service, or in cases of limited access, via a phone call.

Secondly, service representative cases that come to them via the portal or mobile app will be assigned automatically according to business rules or manually assigned (e.g., self-assigned or assigned by a supervisor). Service representatives will need to train customers to access the portal/mobile app for status checking or other requests, keeping all privileged information secure.

In most systems, customers will be able to submit supporting documents via the portal/mobile app. By attaching documents directly to their cases, they will be easily accessible and secured within the CMS database.

People

The most significant challenge will be changing the behavior of customers. Most often these changes require a significant level of communication and coaching followed by elimination of legacy email boxes. The change management effort can be phased to build support as habits are changed. Ideally, the SSO will leverage influential sponsors who will support the transition, become early adopters of the new processes, and assist in selling the convenience and increased reliability of the new CMS processes.

CONCLUSION

ScottMadden's experience is that moving away from email can provide significant advantages for the SSO and its customers. With the right plan, technology selection, and thorough change management, companies can reap significant performance improvements while improving customer experience.

For more information about ScottMadden's corporate and shared services practice, please click [here](#).

To submit a request to learn more about our services, please [contact us](#).

ABOUT SCOTTMADDEN'S CORPORATE & SHARED SERVICES PRACTICE

ScottMadden has been a pioneer in corporate and shared services since the practice began decades ago. Our Corporate & Shared Services practice has completed more than 1,100 projects since the early 90s, including hundreds of large, multi-year implementations. Our clients span a variety of industries from entertainment to energy to high tech. Examples of our projects include business case development, shared services design, and shared services build support and implementation.

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