

Driven by a firm's internal policies and choice of trusted sources, encompass constructs corporate ownership, discovers beneficial owners, and screens entities and persons for risk.

Using advanced intelligent process automation, encompass dynamically builds a comprehensive KYC profile from multiple sources, including corporate registries, company and regulatory data, adverse media and identity verification - enabling fast, confident decisions. Incorporating biometric and eIDV sources for individual KYC verification, encompass delivers one platform to manage all customers.



Business Improvement Academy Project

The BIA delegate from Encompass was a member of the Customer Support & Success team. He worked on an analysis of the Service Desk with a theme of “**Follow-the-Sun- Service Desk**”, aiming to provide seamless around the clock support integrating activity from the global offices.

Project Analysis

The customer Help Desk is the first point of contact for technical issues. The team aim to separate the bugs from “training issues” as the triage process will prioritise bugs for the Engineering team to work on. The customer support team provide help, support and care to customers and they aim to instill confidence of the Encompass products to all customers across the globe.

As the team developed a project charter, they highlighted the need for the project which included:

- Customer support is siloed by region
- Australian customers are only supported on Australian business hours
- Support resources are often sitting idle when issues are pending

- There is a general lack of standardisation due to time differences

A plan was put in place for the project with the objectives of improving times to fix tickets, improving customer satisfactions scores and improved SLA compliance.

The BIA delegate explained his concept of “follow the sun”. It is industry accepted best practice with a team approach spread over multiple time zones passing the torch from site to site - encompass was embracing this concept within a lean approach to best practice.

As the full process was mapped out, it became apparent that this was the first serious attempt to look at global customer support as a joined-up process. The process appeared convoluted with many customer questions and enhancements not being logged or tracked. The map was displayed in a swim lane format linking Customers, Success, Support, Engineering, QA and Products. An example of the current state highlighted:

Example 1

- Customer raised a question about a feature.
- Back-and-forth for several days as Success team tried to clarify.
- When I happened to see the email chain, I recognised a known bug.

- Several days wasted, and time not logged in ticket system.

Example 2

- UK customer raised a bug late in UK day.
- Triage and assigned but no time for engineering team to work on it.
- Discovered the next day that Australian engineering team needed to solve the issue.
- Two days lost when problem could have been fixed overnight the day of report.

Data Analysis

- First Reply Time [Avg] – 0.2 hrs
- Time to Fix [Avg] – 157.0 biz hrs
- First Reply Time – Target is 1 hour.
 - Very quick response time. Suggests that a lot of work is happening before a ticket is raised.
- Time to Fix – Targets vary by ticket priority.
 - Equates to ~ 20 business days
 - Suggests much higher maximum wait time for resolution.
- Numbers are reported but get lost in the noise of data. Also, there are too many KPI's across the board.

Implementing Change

The team used the analysis to create a new process with fewer steps and more concentrated activity at the front end. In summary the process is to:

- Open up tickets in all regions
- Immediately Review Critical to Quality (CTQ) requests
- Liaise with other departments to condense the process
- Set turnaround targets

There are issues to overcome such as the geographical spread of the team, and small teams with multiple responsibilities and split duties in the different regions. However, the process is planned to be ready for full implementation by late 2019

Measuring Success

The new process is more transparent providing consistency across the business. Customer service is improved as the process is more seamless and approx. 10hours of resource has been freed up on a weekly basis for more value-add activity as the company continues to grow. The numerical value of this is £15k.

"I am now more able to pitch, organize and deliver successful projects as I have a new confidence to assert priorities when work needs to be done. People don't fail, processes do"

- **Customer Support Specialist, Encompass**