



Keeping In Touch with Customers - PropertyInfo Case Study

PropertyInfo Objectives:

- Consolidate and streamline 13 regional customer support Centers
- Gain visibility across all customer touch points across the enterprise
- Pro-active customer notifications
- Operational Efficiencies.

Customer Benefits:

- Streamlined operations and consistent processes across the enterprise
- End-to-End service automation
- Increased First call resolution to 45%-50% & SLA performances
- Increased customer satisfaction

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“When we looked at PhaseWare 18 months ago, our call volumes were about 100-150 calls/emails a day; now we have over 400 calls/issues a day. We haven’t grown our support center, or added any new people to handle the volumes. PhaseWare helped us automate our processes which really kept the costs down”

Michael Steelman
VP, Enterprise Customer Care

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Business Environment

PropertyInfo Corporation, a Stewart company provides comprehensive real estate information solutions for residential and commercial realty, title, lenders, builders and developers, underwriters, home buyers and sellers in both US and international markets. PropertyInfo's true strength is its ability to integrate the many disparate systems and technologies available to create an all-inclusive source of solutions. Based in Houston, TX, PropertyInfo is a wholly-owned subsidiary of Stewart Information Services Corp. (NYSE-STC) serving the title, realty and lending markets in three primary ways:

- Data access
- Integrated title and data applications
- Online product distribution through its Web portal, *PropertyInfo.com*.

PropertyInfo’s customer base includes Title, Realty, Lending, Builder/Developers, Law Firms, Insurance and Government market segments. Their current customer support environment includes 20 regional support centers with 5 to 30 support technicians each.

The Challenge

PropertyInfo’s customer service environment includes 20 different support centers spread across the globe. Their customer support operations manage both internal and external help desk centers. PropertyInfo’s key challenge was to have a “unified” view of the support environments across the enterprise. With 20 different support centers, each with its own specific requirements and processes, providing consistent quality customer support experience was a challenge.

With disparate customer support systems, PropertyInfo couldn’t track and measure a specific customer’s service experience and determining overall service quality was difficult. According to Michael Steelman, VP of Enterprise Customer care “Upper management wants to know how many times a customer has called in for support, and it was not easy to figure this out with our existing support tracking systems”.

Some of the critical success factors for PropertyInfo’s business include:

- Ensuring customer satisfaction by delivering the highest quality of service
- Meeting support service level agreements (SLAs) including support response times, first call resolution and Key performance indicators (KPIs)
- Managing operations costs, customer expectations and efficiencies through support automation and self service support tools

Most importantly, PropertyInfo has to stay on top of Customer Support tickets which required multi-channel service tracking (via phone, email and web channels), automatic notifications to customers, and finally pro-active service management.

Traditional and obsolete methods of manual notification, reactive service ticket tracking and maintaining a 24x7 support desk were becoming too costly, inefficient and unsustainable. On top of that, PropertyInfo is SAS70 compliant, and that required a regimented workflow processes with regard to change control management, IT audit policies, and documenting the entire customer support history.

What's at Stake?

PropertyInfo was looking for a direction, and needed a solution to address the following key business challenges:

- Consolidation of Multiple Customer Support Center Environments
 - Streamline and consolidate 20 regional support centers (both internal and external help desks) to a standard customer support solution
 - Develop an easy and efficient migration plan to a new Customer Support solution
- Operational Efficiencies
 - Faster, pro-active customer support management
 - Real-time customer visibility across all support centers
 - Improved customer SLA performances
- Increase Customer Satisfaction
 - Improved First Call Resolution
 - Real-time Customer notifications
 - Provide Customer Self Service tools

PropertyInfo needed a comprehensive solution to manage end-to-end support complexities and growth for the 20 regional support centers. As a leader in the industry, PropertyInfo required the highest levels of “Quality of Service” for growth and competitive differentiation.

PhaseWare's Solution:

PhaseWare Tracker suite of customer support solutions is the ideal platform that provided a path to PropertyInfo's key requirement in streamlining & consolidating their 20 regional customer support centers. By utilizing PhaseWare Customer Support Management applications:

- Tracker for Issue/Incident/Information management
- Event Engine for service automation, and
- Self Service Center for customer self-management & knowledge base access,

all the key requirements of PropertyInfo's Customer Support Center initiatives are fully satisfied.

Customer Benefits:

PhaseWare's Tracker Customer Support Management offering provides PropertyInfo an end-to-end insight into the customer support operations, and creates a smooth transition to the consolidation of 20 regional support centers.

Consistent Service Processes across Enterprise:

With PhaseWare Tracker deployed across the enterprise, PropertyInfo is able to streamline, and combine a variety of support environments. Without changing individual support centers' basic processes significantly, day-to-day operations are simplified. The Tracker Screen designer feature is leveraged for internal customizations. User training is just a matter of playing with the system.

“Once the changes are identified, Screen designer made things easy; it is a breeze to make changes. Moving things around, customization is a snap with screen designer”

*Michael Steelman
VP, Enterprise Customer Care*

“Tracker system is simple, easy and intuitive. Our training document is just one little piece of note book paper.”

*Mary Beth Rittenberry
Sr. Service Administrator*

Workflows & Efficiency Gains through Automation:

Event Engine, the service automation tool provided PropertyInfo the key capabilities for an end-to-end service visibility into the customers. Using Event Engine's notification feature, PropertyInfo keeps in touch with customers and pro-actively communicates on all customer touch points from issue status to updates to resolutions in real-time. In addition to that, workflows, Change control management and SAS70 compliance are achieved through automation.

Operational Efficiencies & Increased Customer Satisfaction:

PhaseWare Tracker suite of products enabled PropertyInfo to achieve significant operational benefits across the board. By leveraging the rich feature set of Tracker, including service automation, pro-active notifications and Self Service tools, customer satisfaction, Quality of Service (QoS) and the ability to meet or exceed customer expectations have increased dramatically.

Some of the key operation efficiency gains include:

First Call resolutions increased to 45%-50%. SLA success rates are up significantly. “We have an SLA on our emails requiring that we respond with in 8 hours, but we usually respond in 30 minutes, as everything happens so quickly” said Mr. Steelman. “Notifying customers automatically has been very helpful. If we had to do that process manually, if we didn't have PhaseWare's tool out there, there is no way we can get through this in our normal day of production, especially with so many emails and high call volumes”.



Conclusion & Summary:

PhaseWare's Customer Support management solutions enable PropertyInfo to streamline their support centers, and provide a clear visibility to all the customer support touch points across the enterprise. PropertyInfo is able to define and deliver on customer expectations through:

- Multi-channel customer issue tracking
- Real-time notifications to customers
- Automated service ticket processing and other capabilities

The Tracker dashboard displays end-to-end customer quality experience, and provides PropertyInfo's executive management a clear view of the service horizon.

A Total Solution

Since installing PhaseWare Tracker Customer Support solution, PropertyInfo has trained over 450 users in all areas of the company. "This is a complete customer contact management application," noted Mr. Steelman.

For More Information

For additional information about PhaseWare Customer Support Solutions, visit www.phaseware.com.

To learn more about PropertyInfo Corporation, visit www.propertyinfo.com

Stewart Inc.'s Press Release: [Stewart to consolidate customer-service software on PhaseWare platform](#)