Success Story

Process Documentation for Customer Support function

Storyline…

The client is one of the leading companies providing business support services to a corporate distributor of mutual funds governed by SEBI regulations in India.

MaGC was engaged to prepare a comprehensive business process document for the client. The exercise helped in identifying gaps in the existing processes of the Customer Support function and re-engineering them.

Once upon a time…

The client was growing at a rapid pace and had reached a stage where standardisation of business processes, providing role clarity and identification of performance metrics was critical to achieve business objectives. A need was felt for the development of a comprehensive Business Process Document covering all functions. Customer Support, being a critical function, was taken up in the first phase. MaGC was engaged to map the business processes, undertake a gap analysis and develop a BPD that addressed the process gaps.

Moving on…

The assignment required the MaGC team to understand the existing processes of the Customer Support function. The team visited the client's office for an on-site process study. The study involved interviews with key persons in the Customer Support Division and structured walkthroughs. MaGC team also collected related documents, reports, and checklists being used.

Based on the study, AS IS process charts were drawn up. MaGC adopted the LAMP™ methodology (http://www.magc.in/lamp/), an in-house tool for process documentation. This was followed by a gap analysis. The gaps identified were shown as callouts alongside activities in the

process charts. Process charts along with the gaps were validated with process owners in a series of brainstorming sessions. The sessions gave the client personnel an opportunity to critically look at their internal processes and identify areas of process improvement.
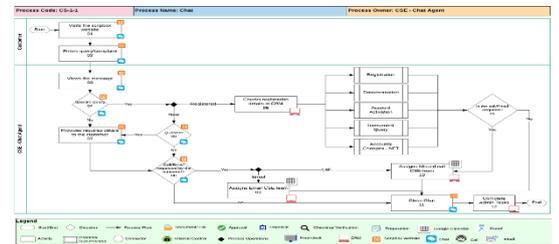
Based on the discussions, the TO BE process charts were prepared. The Business Process Document reflecting the reengineered processes was submitted to the client. The BPD included: (1) Process Charts, (2) Process Descriptions, (3) Key document and checklist references, (4) Turn Around Time Standards, and (5) Process level Key Performance Indicators. Job Descriptions for all levels of organization were also included.

Finally…

The BPD helped eliminate non-value adding and redundant activities in business processes. It serves as a standard operating procedure. The pictorial presentation of business processes and well-defined job descriptions enabled quick understanding making the BPD an effective training guide for new recruits. The process metrics enabled continuous monitoring of process efficiency and quality of service delivery. The improved Customer Support function ultimately resulted in achieving higher customer satisfaction for the client.

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