

"Low Balance" Campaigns Result in "High" Rewards

THE SITUATION

Staffing constraints, tight deadlines, complex reporting and tracking requirements and a lack of proper tools and technology can put pressure on organizations when responding to business events. As a result, many firms are turning to service providers to handle event responses through an outsourced model.

THE SOLUTION

Mutual fund companies often conduct low balance notification mailings to shareholders whose account balances fall below the fund's minimum requirement. These mailings can lead to unanticipated surges in call volumes, particularly when implementing the policy for the first time.

The related spikes often require the diversion of extensive resources from non-call center teams, which disrupts normal business operations.

SS&C's Flex offers a solution to manage campaign-specific calls effectively while maintaining high service levels. The solution includes:

- Dedicated staff with event-specific training (e.g., processing redemptions and exchanges)
- An exclusive toll-free line for the campaign
- Secure data and voice connectivity
- Call recording and monitoring capabilities

THE RESULTS

- Flex successfully provides excellent customer service and implements workflows that integrate seamlessly with clients' existing processes.
- Clients continue to be impressed with SS&C's ability to deliver supplemental call center and processing support during event-driven campaigns.

SS&C Flex: Unmatched global support for business events

SS&C has 30+ years' experience in helping companies respond to seasonal, disruptive or extraordinary business events, with proven expertise in best practices, processes and systems.

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