



SUCCESS STORY

Leading finance company launches new advising program—increases renewals, engagement

INDUSTRY
Finance

LOCATION
North America



Challenge

When a prominent finance company's Strategic Partner segment—which offers tax preparation software, e-tax filing services, and bank products—implemented a financial advising program, they needed top-tier tech support. It was imperative to provide their partners with a seamless customer experience for registration and software installation.

Solution

Humach leveraged its expertise to assist with registrations and licensing entitlements for both desktop and network installations. We also provided first and second-tier technical support for the software, achieving a 92% first-call resolution rate for both tiers.

Impact

By assisting with installations, sorting out complex licensing agreements, providing tech support, and aiding renewal campaigns, Humach helped this client increase renewal rates, raise partner profile visibility, and boost targeted strategic partner engagement.

Expertise in Action

Our client's financial advising program functions as both a repository of resources and a partner rewards system. While accessing this collection of tools is simple and only requires signing up for online accounting software, installation and licensing processes often prove more complicated. Enter: Humach. Taking advantage of decades of customer service expertise, our team assisted with both network and desktop installations in addition to resolving complex licensing agreements.

After consulting with the client, Humach understood that the key to their engagement program was to ensure strategic partners had access to their library of valuable tools and resources. To that end, Humach fielded questions about their online profiles, how to improve said profile, and how to improve SEO. In the end, Humach helped raise targeted strategic partner engagement by 42% and increased partner profile visibility by 78%. Our efforts were so well received that the client advertised them as "white-glove, award-winning support."

The Fruits of Our Labor



92% first-call resolution rate for both tiers



78% increase in partner profile visibility



42% increase in targeted strategic partner engagement



14% increase in renewal rates

“White glove, award-winning support!”

—Our Client

A Personal Touch

Humach goes above and beyond for our clients, and this case was no exception. While it's technically true that we assisted with installations, processed renewals, and resolved licensing issues, that fails to convey the thoroughness of the support Humach provided. Take renewal processing for instance. Our agents certainly helped with the basics, but they also provided much more—basic web support, SEO improvement coaching, printing assistance, and more. Our agents even went so far as to provide technical support for issues like software errors and data recovery, despite the fact they received no formal training in these areas. After documenting these cases to expand the client's Knowledge Base library, our agents would then bring in the client's in-house tech support team.



Back For More

Beyond installation and licensing, Humach also processed renewals for the client's financial advising program, ensuring customer benefits, discounts, and online profiles remained up to date at all times. Their customers were so pleased with Humach's efforts that renewal rates rose by 14%. Our agents even helped members reset their passwords for webinars, ensuring they arrived at their digital events on time and ready to learn.



“Every action we took was notated and tagged with a Knowledge Base Article.”

*—Charlotte Fauser,
Humach VP of Agent & Client Engagement*

Support For All Seasons

Humach's relationship with this client, a leading financial organization, is one built on service, and our agents served their customers at every step of their customer journey. For new users, Humach agents ensured the installation process remained seamless and stress-free. The bulk of our efforts were spent helping customers register their software, a process that can prove somewhat convoluted, depending on the complexity of the customer's licensing needs. In the words of Humach's VP of Agent & Client Engagement, Charlotte Fauser, "Whether they had discs without documentation, a list of licenses with no record of which disc they corresponded to, or multiple copies of the software, we either generated or found the proper licenses for their customers, no matter the situation."

Humach agents were trained to provide support for multiple releases and versions of the client's software, communicating to customers which products would be sunsetted in the case of older licenses.

Humach is a purpose-driven customer experience solutions provider that empowers companies to continuously improve the customer experience. Humach combines the strength of both humans and machines to simplify, streamline, and maximize the effort of both your customers and your teams.

