



CASE STUDY

Streamlining Business Processes with a Dedicated Offshore Team



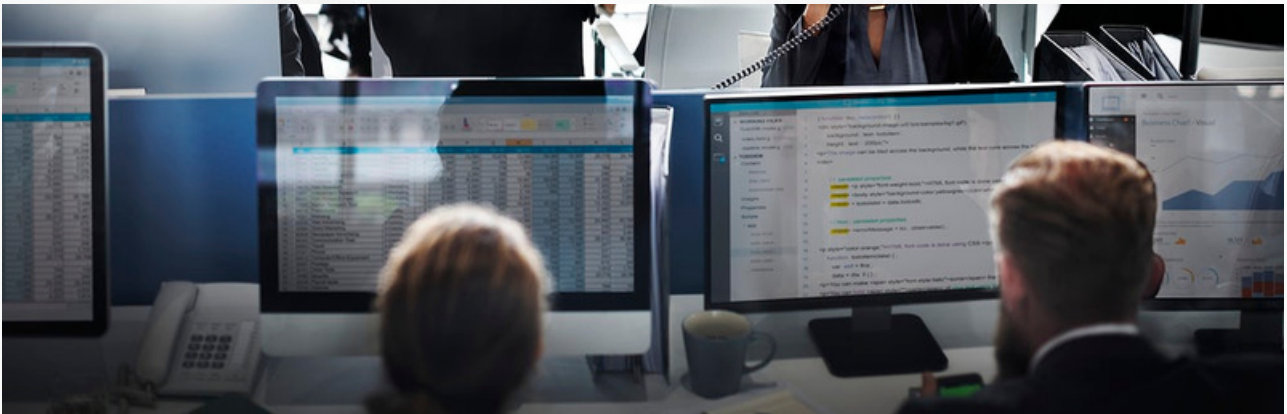
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Overview

The client is a high growth, fintech service provider offering automated employee and income verifications through secure application programming interface and developer tools. Compliant in data security, the client understands the importance of employee data sharing, privacy and accessibility.

The client is a trusted key player in the information verification field, with thousands of trusted industry leaders and partners integrating the service in their verification process.



Solution

To further streamline the income and employee verification process, the client required additional staff to communicate with respective in-house Human Resources and Payroll services departments of the client's partners.

The goal: to provide assistance in verification requests and corresponding follow-ups.



Solution

Connex Global Solutions established a dedicated offshore team of experienced leaders and outreach specialists to assist in the completion of employee and income verification claims.

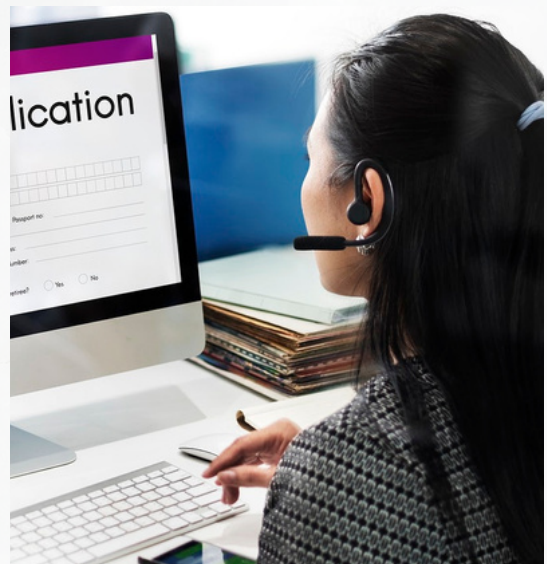
Connex actively sourced offshore talent required by the client. Comprehensive assessments, screening, testing, and interviewing were conducted by Connex, ensuring the client the highest level of talent from the pool.

During the onboarding and initial training period, the client conducted virtual training for the dedicated Connex staff via cloud-based connectivity training sessions. Several specific training aids and manuals were also provided during the sessions. Succeeding training and other support for incoming client dedicated staff were conducted by service delivery leaders.



Connex Global Solutions assigned an offshore service delivery manager to act as the dedicated point of contact of the client and is responsible in overseeing and managing the daily operations of the offshore team. The dedicated service delivery manager and team leader also conduct performance reviews, provide real-time quality monitoring and teach back sessions, employee motivation, ensure accuracy and quality of work of the team, and set timelines to achieve goals.

The Connex offshore team of outreach specialists were responsible in communicating with the HR and Payroll departments of client partners via outbound calling and emailing regarding employment verification claims. The dedicated outreach specialists call respective representatives for completion of verification claims and send the necessary responder forms such as authorization and verification forms as required.

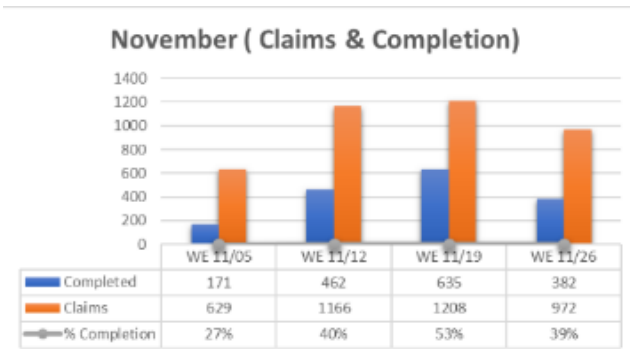


Sample reports consolidated by the Connex team are as follows:

- Employee Feedback Survey
- Claims and completed
- Weekly Trend – Claims and Completed
- Quality Control

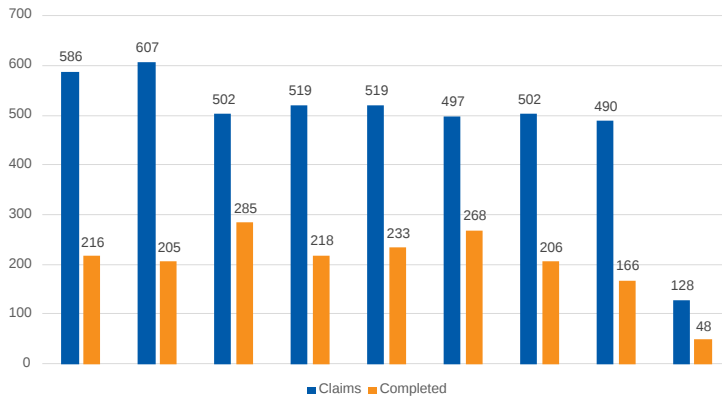
Sample Weekly Reports by Connex:

Weekly Trend - Claims and Completed



- Claims: 4350
- Completed: 1845
- % of Completion: 42.41%

Claims and Completed



- Claims: 4350
- Completed: 1845
- % of Completion: 42.41%



Cloud-based collaboration tools used for client and offshore team communications are the following:

pipedrive

zendesk

slack

Connex Global Solutions, in close coordination with the client, established key parameters for the dedicated team of Connex offshore outreach specialists:



Quality



Productivity



**Skills &
Knowledge**

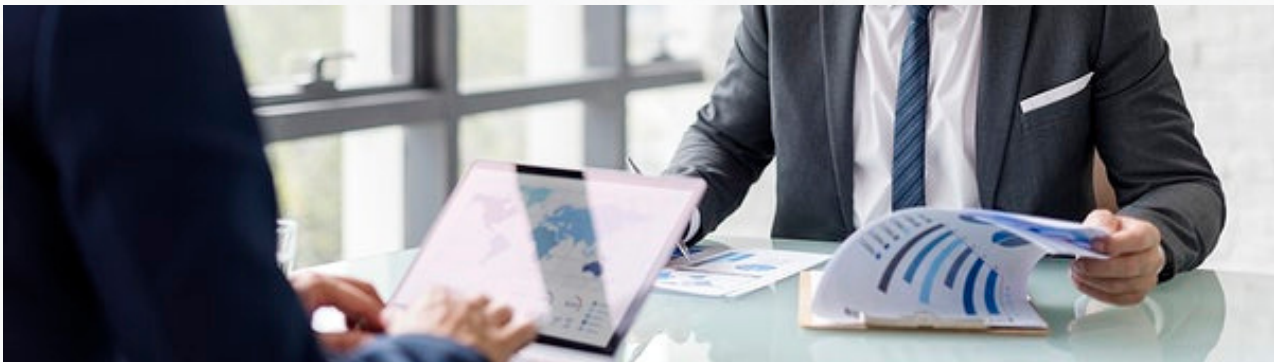


Engagement



**Overall
Performance**

Since getting onboard with **Connex Global Solutions** this Q4 of 2021, the dedicated offshore team continues to contribute to the overall productivity of claims completion and continues to provide excellent service delivery for the client, with all employees achieving a quality score above 95%. Calibration meetings are conducted regularly between the client and the Connex offshore team to ensure excellent service delivery and performance monitoring.



The dedicated offshore team also spearheads process improvement by identifying challenges that arise, and opportunities for continuous process improvement and development. Further action plans are set to further leverage the offshore team such as Q&A session with clients, focus group discussions with process updates, weekly coaching sessions, and sharing of best practices.

The team has scaled from 4 to 13 full time employees in a few months' time as they ramp to meet their growing volume requirements. By augmenting local operations with offshore staff, the client has been able to exceed growth goals because of increased productivity and efficiency.

