

CREATING CUSTOMIZED EXPERIENCES FOR UPS CAPITAL

CASE STUDY



PTP performed a top-down assessment for an enterprise-wide realignment of UPS Capital's (UPSC) overall strategic vision. With PTP's integrated customer experience approach, PSC reinvented several business processes, changing how management viewed customers.

THE CHALLENGES UPSC FACED

UPSC's online and print knowledge bases could solve many routine customer problems. However, other channels were more convenient for some customers and provided missing insights.

Because data existed in silos, management had no real-time or historical profiles of customers. UPSC needed an accessible knowledge base for customers' use to relieve strain on customer service resources.

THE RESULTS

UPSC launched a unified, massive knowledge base to its customers. The claims process was redesigned for UPSC's vision of multi-channel methods of contact without causing further customer frustrations.

Given UPSC's global reach, localization was also prioritized with segmentation, resulting in increased sales and engagement with the brand.



INNOVATIONS THAT LED TO IMPROVED CUSTOMER SATISFACTION

- **Identifying Areas of Improvement:** PTP performed a technological assessment of UPSC's customer experience and identified key technology gaps preventing the company from reaching its goals. Examining differing customer needs led to developing new processes and treatments.
- **Integrated Customer Segmentation:** PTP created a new, consistent, integrated customer master, where each segment is addressed according to their location, revenue generation, industry, size, and other criteria. This allowed UPSC to address unique business needs with products and services.
- **Customer Experience Survey:** PTP designed a customer experience survey that provided insight into customers' sales process and segmenting, producing data to determine spend patterns and other crucial metrics for increasing sales.

ABOUT UPSC

United Parcel Service Capital (UPSC) is the financial and supply chain management of UPS, providing financial, insurance, and payment solutions.

UPSC partnered with PTP to offer their customers more channels, expand its global reach and improve the customer experience.



LEVEL OF REACH

+736K

MEMBERS

400

CONTACT CENTER AGENTS

CHALLENGES

Disconnected claims process with poor scalability

No real-time and historical views of the customer

Siloed internal knowledge management and business processes

Fragmented channel connectivity

PTP'S SERVICES

Customer experience assessment

Customer experience strategic roadmap and implementation

Sales process and customer survey design