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## Wolters Kluwer's Expert Insights

# A new generation of quality and customer experience (CX): Best practices in customer service and support

Janet Siemers, Director, Customer Service Operations, Wolters Kluwer Compliance Solutions



## Discover what it takes to deliver a superior customer experience

Continuous Quality improvements are an increasingly important priority in enhancing the customer experience (CX) and addressing complex regulatory compliance issues. The concept of Quality has changed and evolved over time. Looking back to the industrial revolution, and starting with Quality 1.0, we saw a progression from inspection and measurement to maximizing productivity in Quality 2.0. In more recent times, Quality has further evolved as a business imperative, with customer satisfaction of paramount importance with Quality 3.0. The confluence of people, business, and technology has never been more critical to achieving operational and business excellence through Quality.

As the “tip of the spear,” service and support teams are not only a first-level interface to customers, but they are increasingly critical to their organization's overall CX journey and Quality initiatives. [Janet Siemers](#), Director of Customer Service Operations at Wolters Kluwer Compliance Solutions, recently provided her perspectives on the evolution of services-led quality initiatives, improving the overall customer experience, and supporting it with increased employee enablement and engagement.

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*Our success comes from our customers and our agents. You must listen to both sides of this equation. You need to seek input and know when to make adjustments to meet your customer's needs and your agent's needs.*



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**Q: How can support services help optimize the overall customer experience?**

**Janet:** We have engaged in continuous quality improvements to optimize our overall CX. We want our support services to instill confidence in our customers, so they trust it will be right and, more importantly, it will be easy. When a customer decides to call support, they've most likely exhausted all other options at their disposal. They need help! They have commitments to make and deadlines to meet. They pick up the phone or get ready to send an email and think, "Let this be easy!" We refer to this as our "point of truth." For us, this happens hundreds of times a day, thousands of times a week. Every time it happens, it is an opportunity for us to demonstrate to our customers that they made the right decision to do business with us. We optimize our CX through a service model designed to provide predictable, consistent service every time. Our goal is to enhance the "point of truth" every time and make it better for our customers, not only to solve their problems quickly and easily, but to identify any opportunity to build a better process, a better product, or a better agent.

**Q: How does this relate to overall quality initiatives? What are the parameters of Quality that have the most significant impact on the overall customer experience?**

**Janet:** Our Quality program has two components. We consider the customer experience one of those components and the agent's experience the second

component. The insights we capture from our quality program tell us where we need to invest our time to improve on that "point of truth" in the customer's journey with Compliance Solutions. These insights tie directly to enhancing the customer experience and help us focus on categorizing the actions from those into areas of improvement for our product teams, internal processes, and agent training.

**Q: What has been the evolution and history of Quality programs at Wolters Kluwer?**

**Janet:** Wolters Kluwer's Support Line team has engaged in continuous Quality improvements over the past several years to enhance the customer experience in resolving financial services customers' (including banks, insurers, etc.) issues. The evolution from Quality 1.0 to Quality 3.0 required us to look at it differently, including:

- We realized we were measuring the agent with the belief that we knew what the customers wanted from us
- We needed to bring in the customer experience as we assessed ourselves
- Once we focused our efforts on the customer, employee insights followed—this helped change the triggers we were using to conduct assessments

We found it wasn't as necessary to listen to each agent as much and that we needed to assess and address the main factors causing customers to experience high effort doing business with us.

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**Q: Education, training, and enablement are critical in any services-led business. How have you provided both an environment and a program fostering continuous learning?**

**Janet:** Moneyball! Just like in the movie, where a winning baseball team was assembled on a shoestring budget using an analytical and scientific approach. Spending effort and investing the time to develop agents is the number one insight we received. Building a culture of learning is critical for us to increase our agent's confidence in their ability to interact with customers. We have complex products that serve markets that are highly regulated. They require us to maintain deep domain expertise in the markets we serve and the knowledge to operate the products that serve those markets.

We have implemented a unique model that allows team members to advance their knowledge in a safe environment. We have a large team of agents supporting multiple products and they are all at different points in their knowledge development. It is important to meet them where they are today and provide the right information for them to advance to the next level of expertise. We want to enable every agent to solve the issue as close to the customer interaction as possible. This requires a culture where feedback is not just heard and acknowledged but actioned, with real steps to prevent the same mistake twice. Our team members are groomed to receive feedback as an opportunity to improve and not to be feared as something that is noted in a review.



**Q: An important customer support requirement is self-service and rapid response. How does a portal-based self-service model provide that? What are the key business processes required to make it successful?**

**Janet:** It is important to understand your industry to know what technologies and service options will meet your customer's needs and expectations. Self-service is excellent and should be a part of any great service model, but it shouldn't be the only option available. Sometimes, customers just need a quick question answered, and self-service or chat options work great for this. We take an opti-channel approach. This allows the customer to use the optimum channel for their need when they need it. Moving forward, millennials expect self-service and the necessary tools to deliver this channel for complex regulatory issues. This will require advanced technology to continue to exceed customer expectations. The key to these technologies will be content and knowledge that is authored in such a way as to predict what the customer is looking for.

**Q: Your team recently won several of the prestigious [Stevie Awards for excellence in sales and customer service](#). What are the lessons learned, and are there established or emerging best practices you can share?**

**Janet:** There are no secrets in the service industry. There are plenty of books and accomplished authors who can tell you what you need to do to provide outstanding service, but very few companies do service really well. Part of the reason is that great service means different things to different customers and industries. Customers want service to be easy. That's it! The magic is when you know what your customers expect, and you can implement the knowledge and tools to make that happen.

Our success comes from our customers and our agents. You must listen to both sides of this equation. You need to seek input and know when to make adjustments to meet your customer's needs and your agent's needs. For us, that is a constant feedback loop that builds on itself and provides our path forward. So, we make the right investments in time and resources, going after the endless pursuit of improving the customer experience.

Enabling organizations to ensure adherence with ever-changing regulatory obligations, manage risk, increase efficiency, and produce better business outcomes with technology-enabled expert services and solutions focused on compliance has never been more critical. For more information, [see our solutions](#) developed for financial services and FinTech organizations.



**Janet Siemers** is Senior Director, Customer Service Operations for Wolters Kluwer Compliance Solutions. She provides guidance and direction for the Technical Support team within the Customer Experience and Delivery department of Wolters Kluwer Compliance Solutions.

*Siemers leads a team of over 80 team members focused on delivering answers to customers' inquiries and innovating solutions for customers' workflows and processes across multiple technical platforms from OnPrem Client/Server to SaaS-based applications.*

*In her 37 years of serving customers, her desire to serve others, make it right, and do it better, has served many thousands of customers and helped grow their business.*

*Siemers earned her degree in Computer Science and quickly realized she was not meant to stay in front of a screen. She has shifted her engineering skills to building service solutions that benefit Wolters Kluwer Compliance Solutions customers and internal team members, earning multiple industry awards for the team.*

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