Superior
TREASURY SOLUTIONS EXPERTS

Technical Assistance Center

IMPLEMENTATION PLAYBOOK

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Using a provider for targeted customer service during a conversion can be a game-changer for financial organizations. It lets your team focus on the critical tasks such as implementing new systems and processes, without the added stress of managing customer support.

By partnering with Superior, you gain access to a dedicated group of experts who specialize in customer service and banking platform support. Our Technical Assistance Center (TAC) possesses the necessary skills and expertise to efficiently manage all technical issues and ensure your customers receive prompt assistance.

Technical Assistance Center Implementation Playbook offers a complete roadmap to outsourcing customer service to Superior during a software conversion, migration, or system update. This step-by-step guide provides a clear pathway to establishing an effective third-party customer support team in just 90 days.

SUPERIOR'S TAC MIGRATION SERVICES SOLUTION

STEP 1 Preliminary Assessment and Setting Scope

Before diving into the onboarding process, Superior will conduct a preliminary assessment to understand your organization's needs and expectations.

Client Needs Analysis

We review your project's unique requirements, gathering critical data such as the number of clients affected, key dates and the specific level of assistance needed. This analysis forms the foundation for our recommendations which include performance goals, retention rates, the number of support staff needed and a tailored communication plan.

Define Service Level Agreements (SLAs)

We document the agreed level of service including **completion rates** and **satisfaction rates**. Drawing upon our historical program statistics and industry averages, we provide valuable insights aimed at optimizing overall performance and enhancing customer retention.

Contract Review

In the contract review phase, we outline the project scope, specifying:

- Start and end dates
- Required support types
- Agent quantities
- Training schedules
- Shared responsibilities

Our goal is to ensure that all parties have a clear understanding of contractual agreements, including Service Level Agreements (SLAs) and pricing structures. This step sets the stage for a transparent and successful partnership.

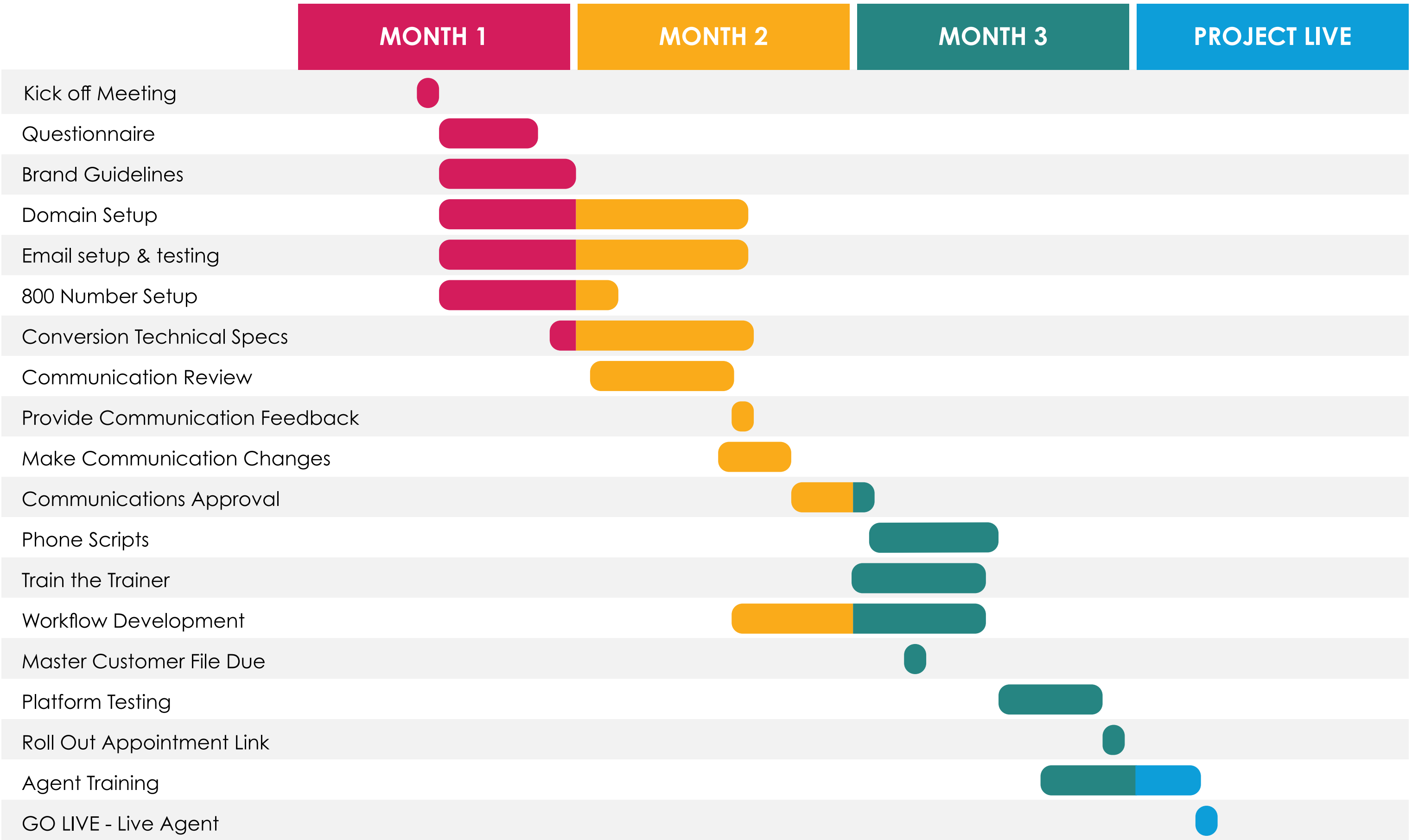
Project Kick-Off STEP 2

The kick-off meeting is a crucial step in the process of understanding your customer service requirements. It is essential we meet with all stakeholders, including the project team, IT team, senior and mid-level management, and external partners, to define your goals and objectives. During the meeting we will:

1. Clarify your project's scope.
2. Determine the technical issues and processes TAC will support.
3. Establish the level of support expected.
4. Set objectives and desired outcomes.
5. Agree to key milestones and critical deadlines.
6. Set the project launch date.

It is important to share as much information as possible during this meeting to make sure that the project delivers to your expectations.

Implementation Timeline



STEP 3 Information Gathering

At the start of your project we'll collect key information to ensure smooth project implementation such as:

Brand Guidelines

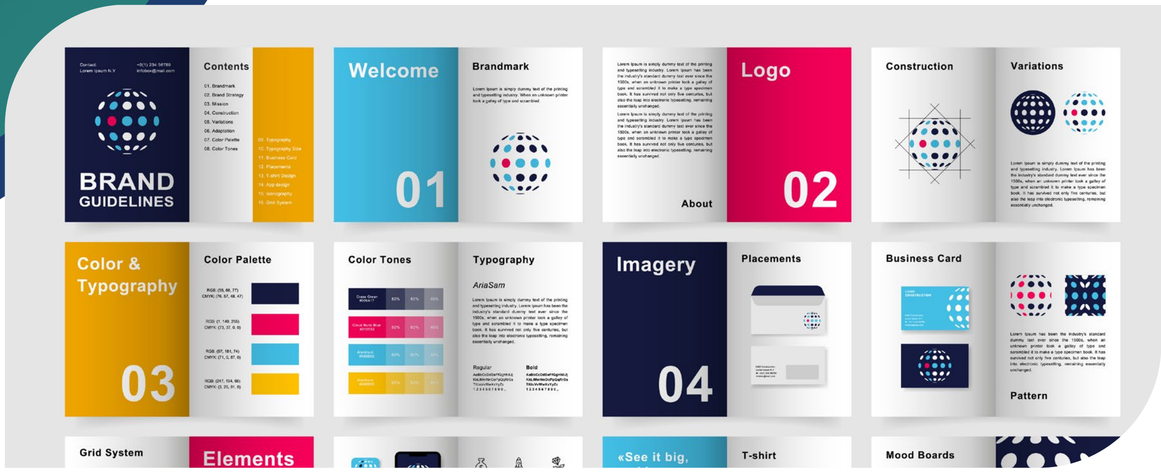
These guidelines, including logos, colors and design elements, will help us maintain a consistent brand image.

Implementation Questionnaire

A comprehensive document to gather project specifics, including goals, stakeholders, technical requirements and timelines.

Conversion Technical Specs

Essential for seamless software conversion, these specs provide details on data formats, migration, and compatibility, ensuring a seamless transition. Examples include software installation guides, product specific operating system and browser minimum requirements, and comprehensive training documentation.

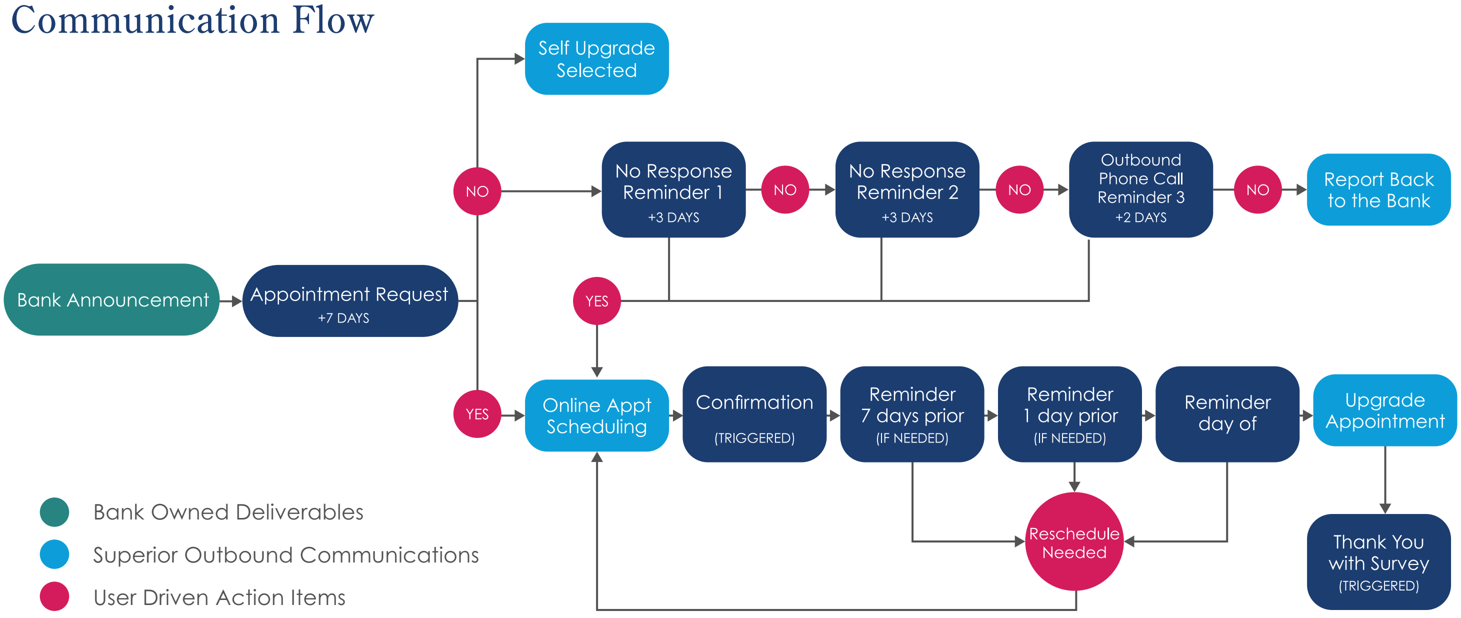


Communication Set Up **STEP 4**

Clear communication is essential for the success of the project. During this stage, we establish communication channels between your organization, TAC and your clients. Key tasks include:

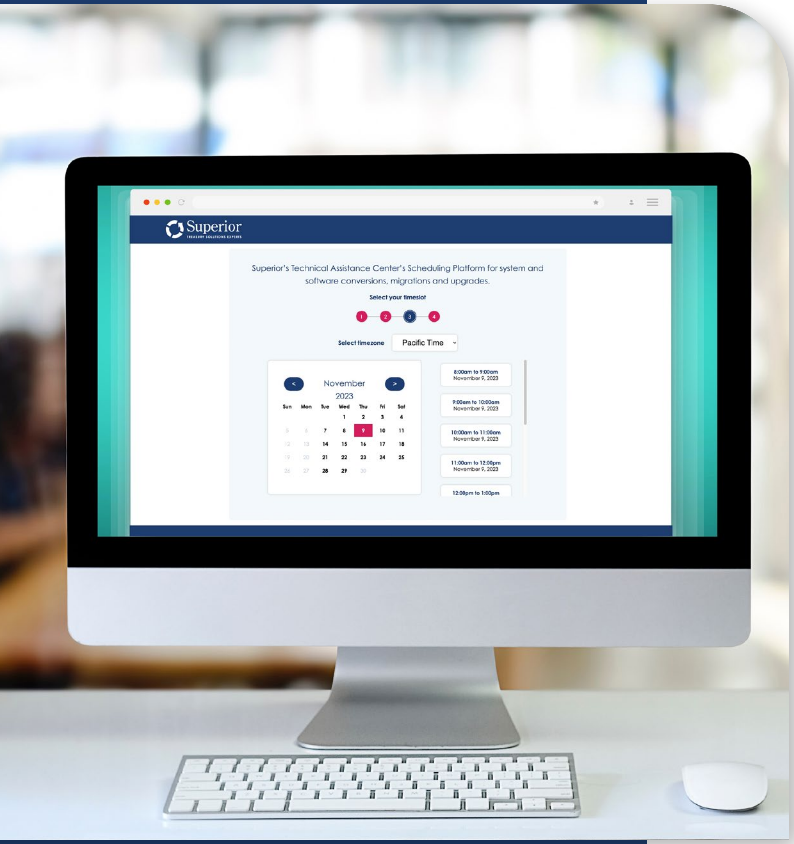
1. Establish a toll-free phone number, which can be used by customers to contact for technical support.
2. Set up a domain for email communication.
3. Review and approve email copy to ensure that it is consistent with your organization's branding and communication style.
4. Review and approve phone scripts to guarantee the team can handle all types of customer inquiries effectively.
5. Begin gathering landing page content including key dates, training guides, and frequently asked questions.
6. Compile video and webinar content, including set up of registration systems if option has been selected.

Communication Flow



STEP 5 Platform Setup and Configuration

Our proprietary TAC scheduling platform and client driven customer journey is easy to use, efficient, and effective in resolving customer issues. Here are the main priorities to make sure we have the best information to help your clients:



1. Create a **user-friendly landing page** for customers to schedule appointments with our team. This is integrated with the ticketing system.

2. Set up the **ticketing system** to track and manage customer issues and provide automated workflows for issue resolution.

3. Conduct **end-to-end testing** of the platform to identify any issues or gaps in the process, including simulating different customer scenarios. We invite our clients to assist with end-to-end testing to experience what the customer experiences.

4. Set up **trigger based automated workflows** to support all client communications via email and phone.

5. Establish an **escalation process** to ensure that complex issues are promptly moved to higher levels of support. This process will be clearly defined, documented, and communicated to all staff.

Team Selection and Training STEP 6

We build a skilled and dedicated team of experts to provide outstanding service to your clients.

Team Selection

We carefully assemble a dedicated support team tailored to meet your specific requirements and the complexity of your technical environment. Our team members are chosen for their relevant expertise and skills.

- Bilingual
- QuickBook Experts
- Escalation Team
- UI Experts

Training

We start the training process as soon as possible to provide exceptional customer support from the start. Our training includes:

Developing Technical Specification Documents

These documents serve as comprehensive guides for our TAC team in issue resolution offering step-by-step processes and troubleshooting tips for all types of technical issues our team will support.

Train the Trainer Sessions

We train the team on technical issues and how to effectively resolve them.

Role-Playing Sessions

By simulating different customer scenarios our team has the opportunity to practice issue resolution.

Resource Landing Page

We build a centralized hub for TAC staff to access technical specification documents, training materials, and other resources to support issue resolution.

STEP 7 Client Data Management

We handle your data securely and efficiently ensuring a hassle-free experience for you.

Data Import

We import customer data into the TAC platform allowing our team to access customer information and history during support sessions.

Data Security

Keeping your client's information safe and secure is our number one priority. We have a range of security features and services to keep your client's data secure.

Data Compliance

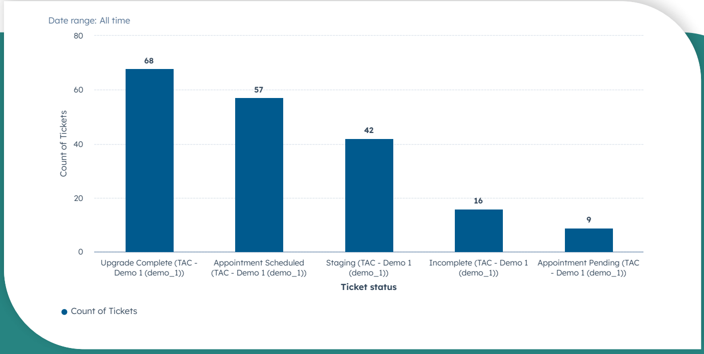
We are SOC certified and follow data privacy regulations using clear data governance protocols to make sure your client's data is handled responsibly.

Data Analytics

Detailed analytics allows for more tailored and meaningful interactions leading to an enhanced customer experience.

Reporting **STEP 8**

During this stage, we implement reporting tools to track key performance indicators (KPIs) and service metrics which we share with you for complete transparency.

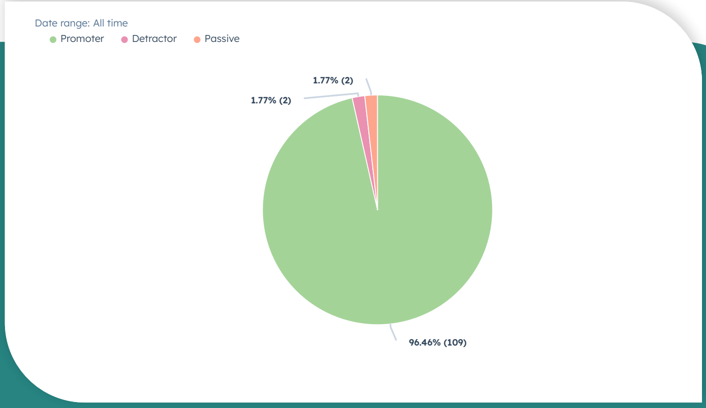


Daily Project Snapshot

This daily report provides an overview of key metrics including ticket status, disposition, escalations, CSAT, and basic email reporting.

Daily File Extract

An excel file for all active tickets that includes key data fields such as ticket status, disposition, agent assigned, appointment dates, and current notes. Extract fields are used to provide the banks with necessary information that may trigger setting up entitlements or shutting off old systems.



Weekly Reports

Depending on your project needs, we provide weekly reports regarding call queue volume, Zoom metrics, and detailed customer comments provided through surveys.

STEP 9 Launch

> My contact was courteous, knowledgeable, thorough, and patient throughout the entire process, which went smoothly and easily.

> Quick, friendly and professional.

> It was as if he were sitting next to me. Very knowledgeable, personable and easy to understand.

> The process was easy to understand and was completed in a timely manner.

Now that all preparations are complete, it's time to go live and transition into full-scale support.

1. Launch the scheduling landing page, enabling customers to book appointments with our dedicated TAC team.
2. Start email deployment to inform your customers of the project launch and provide instructions on how to access technical support.
3. Open the phone lines to allow access to technical support.
4. Begin sending automated reports to track performance and identify areas for improvement.
5. Implement a process for continuous improvement by conducting regular performance reviews, analyzing customer feedback, and making necessary adjustments to optimize service delivery.
6. Establish a feedback mechanism, such as a survey, to collect client feedback on support services and use it to drive continuous improvement.

Ongoing Relationship Management STEP 10

Building, maintaining and managing relationships is our area of expertise. You will be provided a project manager who will lead the implementation and monitor the project throughout the project timeline.

We schedule weekly project check-in meetings to discuss service performance, identify areas for improvement, and align on strategic goals.

- Review timeline
- Evaluate project status
- Discuss CSAT scores and customer comments
- Track escalations
- Troubleshoot issues and review solutions
- Assess changes and improvements

"The feedback we received from our commercial clients, as well as from various stakeholders within the bank regarding your TAC specialists was all very positive. We were able to complete both phases of our conversion project on time and within budget thanks to your team's expertise and commitment to the outreach efforts to fill your training schedule. Your team exceeded our expectations and we will certainly look to use Superior for future conversion related engagements."

JOHN O.
VP - SENIOR PRODUCT MANAGER

Choosing to partner with Superior for your customer service during a conversion is a strategic move that calls for careful planning, seamless execution, and ongoing monitoring and refinement.

Our Technical Assistance Center team has the experience and skills to provide technical support to customers during the transition, freeing up your internal resources to focus on the core business objectives. You can minimize disruption and ensure a successful customer experience.

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Book a call with a solutions specialist.

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