

# ViaSource removes human error and improves contact center efficiency



## About

- Contact management pioneer, providing inbound and outbound programs
- Holds an A+ from the BBB for commitment to excellence in customer service

[viasourceos.com](http://viasourceos.com)

## Goals

- Support their rapidly growing business and optimize existing workflows
- Reduce their high margin for human error and amount of manual data input
- Update and optimize ViaSource's existing call routing system

## Approach

- Engage with ViaSource to understand needs and the needs of their patients'
- Thoroughly understand the interplay between existing integrated systems
- Combat data entry issues, streamline workflows, and capture call data

## Results

- Zero data loss
- Significant process optimization via automated IVR solution
- Over 18% cost savings each month
- Human error removed from the equation

ViaSource Solutions is recognized as a contact management pioneer. They provide cutting-edge inbound and outbound programs to the business community.

Their industry-leading expertise, custom solutions and recruiting know-how drive KPIs, spark revenue growth and create value for a variety of verticals – from medical to education to energy.

## Growth on the horizon

ViaSource was experiencing an evolution: business was growing rapidly and needs were changing almost daily.

**One workflow in desperate need of an update was ViaSource's call routing system.**

The existing process included a high margin for human error, with a fair amount of manual inputting of customer data, time-consuming transfers between agents and product specialists, and a costly per-call transfer fee.

## Meeting their needs to scale

ViaSource knew they couldn't expect to scale successfully with such a faulty, antiquated system.

Their **immediate need was for a platform that would address their contact center issues.** But they were also looking for a company that was invested in a customer-centric approach who had a team of knowledgeable technical professionals and savvy account managers who could help them execute all of their operational goals.

A flexible, user-friendly platform was high on their list of priorities while call quality and system stability were essential for their rapidly progressing expansion.

ViaSource found a match for their needs in Connect First. From the outset, the contact center software company's team engaged closely with ViaSource, taking great care to thoroughly understand ViaSource's needs and requirements.

Connect First was able to quickly devise an effective strategy to integrate existing systems, combat data entry issues, streamline and automate ViaSource's existing workflows, and capture important call data from abandoned callers.

They built a custom front-end IVR for easy automation, ensuring all calls were successfully captured and documented. The IVR automatically accessed ViaSource's third-party system for patient ID information and inserted the information into the agent's survey, eliminating the need for button-clicking, verbal confirmations, and manual entries.

### Maximize agent time and save

With Connect First's highly efficient new system in place, ViaSource agents were able to significantly save and maximize their time. Consequently, ViaSource was confident in their abilities to scale — their ultimate goal.

All calls are now captured and the integrity of the corresponding data is assured. A trusted system of record was successfully implemented, human error was removed from the equation, and customer service improved.

Connect First's efficient new system reduced unnecessary minute usage and switched the company over from expensive DID transfers to more cost-effective SIP transfers.

This switch combined with the integration of Connect First's platform resulted in **upwards of 18% per month in savings.**

With a new system on board and a dedicated team of professionals at the ready for assistance, ViaSource is poised to continue their upward trajectory while continuing to stay true to their customer-centric objectives.

---

### About Connect First

Hi, we're Connect First. We create cloud-based contact center software that helps companies like yours unlock the potential of your contact center. We provide simple and elegant solutions to complex communication challenges. Built for the cloud from day one, our platform offers the highest uptime and most reliability in the industry. We care about your business as much as you do and seamlessly combine technology with a proactive high-touch customer support approach to help you do more with your contact center.

+1 (866) 929 1390

[info@connectfirst.com](mailto:info@connectfirst.com)

[www.connectfirst.com](http://www.connectfirst.com)