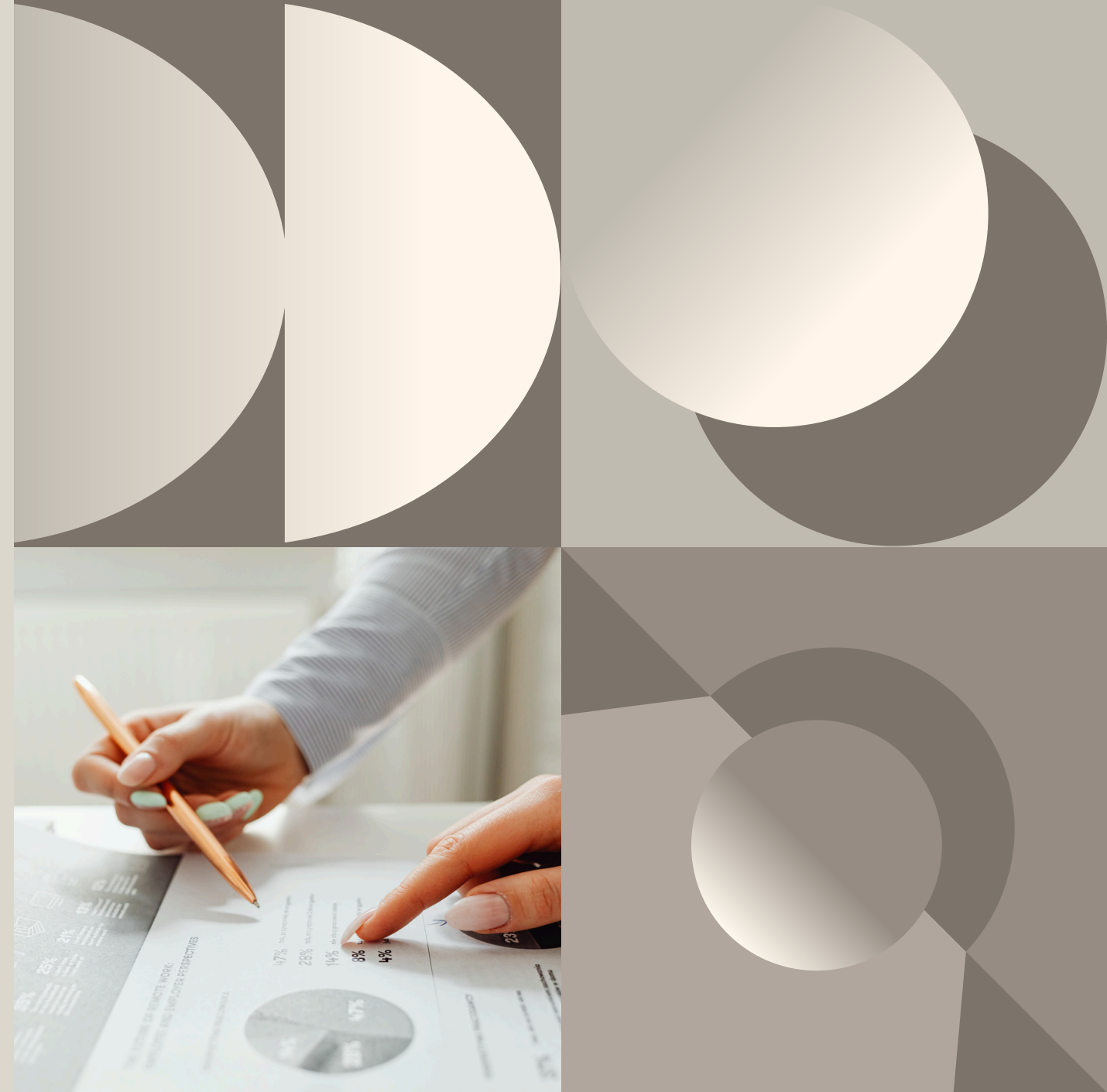


Workflow Discipline, Expectations, and Measurable Results

Case Study

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Overview

- Objective: Re-engage unresponsive clients to complete required steps for settlement eligibility
- Focus: Workflow execution, expectation setting, and operational performance
- This case study highlights how structured workflows, compliant communication strategies, and clear internal expectations led to significantly improved client engagement and completion rates across two large-scale retrieval efforts.



The Challenge

- No standardized outreach workflow
- Inconsistent messaging and urgency
- Limited visibility into client-level progress
- No measurable system to track effectiveness



The Solution

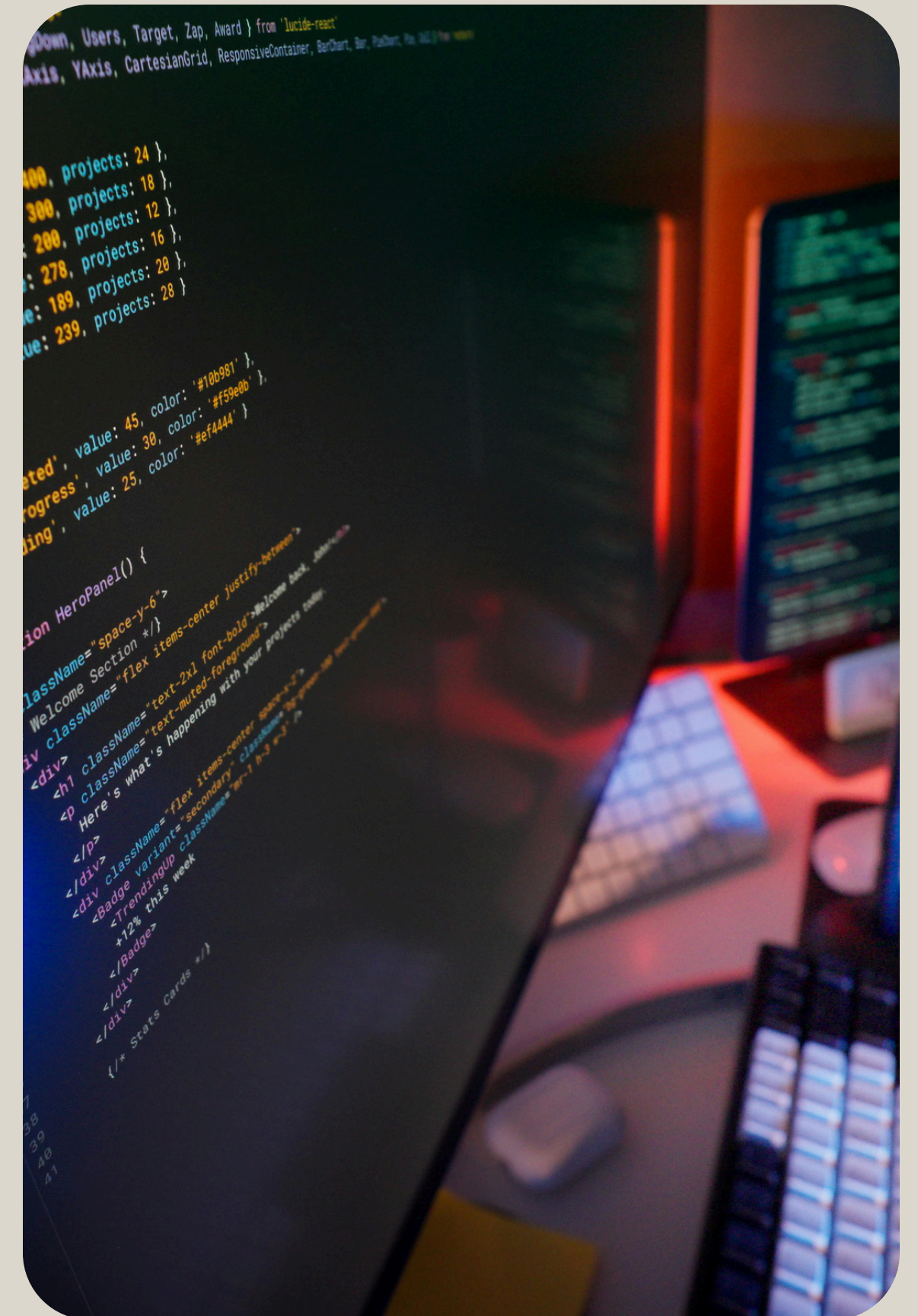
- Defined the goal clearly: Reach the client and instruct them on exactly what they needed to complete
- Created an approved, compliant outreach script
- Designed a phone strategy to avoid spam flagging and increase pickup rates
- Trained staff not just on what to say, but why the work mattered
- Established urgency while maintaining compliance



IT Strategy and Implementation

IT & Systems Actions

- Collected and validated the client list
- Imported all records into the CRM
- Created individual casework for each client
- Enabled traceability and measurability at the client level



Results

- **FIRST PROJECT**

- Clients Contacted: 356
- Successful Completion: 313
- Completion Rate: 88%

- **SECOND PROJECT**

- Total Clients: 693
- Completed: 660
- Completion Rate: 95.1%



Why the Strategy Worked



- Workflow design must precede execution
- Clear expectations drive staff confidence and consistency
- Systems and CRM visibility are critical for scale
- Clients respond to urgency when messaging is clear and compliant
- Measurable processes allow for rapid optimization

