



### Case Study Information

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A UK-based private limited service provider that specialises in reclaiming overpaid tax for specific service related professionals. The company focuses on special tax claims in relation to industry occupation and line of work. The focus is online claim applications where a simplified claim process allows users to fill in an online claim form to ensure they receive the maximum refund in the shortest possible time. The contact centre function, outsourced to Johannesburg South Africa, provides trained agents to speak to applicants on behalf of the customer service department to assist with the process.

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### Challenge

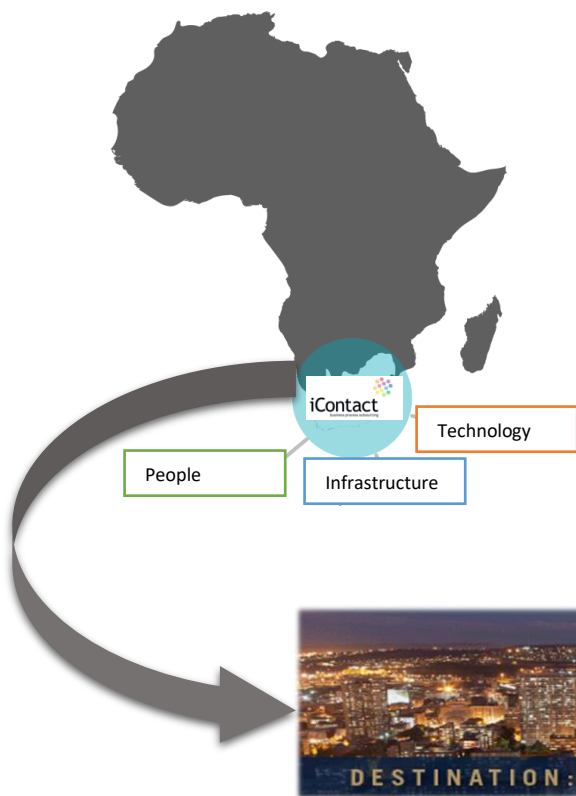
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- Assisting tax-paying professionals through the online claim process and converting them into loyal clients.

### Solution

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Offer potential clients the enticing pitch of a free service upfront.  
Guide interested applicants who are browsing the online claim form through all relevant information and assist with any queries.  
Send consumers follow-up communication via email and telephone calls to inform and equip them with the right knowledge and action steps towards utilizing the tax-back service.  
Once fulfilled, successful claims convert first-time applicants into loyal win-back clients.  
All completed applicants to receive a courtesy welcome call.  
Incomplete applicants to receive customer service call to assist in the completion of their online claim form.



### Outcome

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- Success in getting interested potential clients to utilize services.
- 30 000 new customer leads generated per month.