



CASE STUDY

DELIVERING COMPLEX BENEFITS & PAYROLL SUPPORT AT SCALE

How iContact BPO delivered quick, accurate and compliant support on issues directly impacting employees' pay, benefits and peace of mind.

At a Glance

- Average Handle Time on Calls: 7 minutes - achieved
- Average Speed to Answer Calls: 3 minutes - achieved
- Average Speed to Answer on Mails: 24 hours - achieved
- Abandonment Rate on Calls: < 5% - achieved
- 100 % Overall Satisfaction: 93% achieved
- 100% Issues Resolved: 92% achieved
- 100% Quality Assurance Score: 91% achieved

The Challenge

The client is a leading Human Capital Management (HCM) software provider that delivers an integrated platform for employers, bringing payroll, HR, time and attendance, benefits and compliance together in one system. Given the complexity of HR benefits administration, payroll and compliance, the client needed a BPO partner who could deliver Tier 1 customer support that matched its own high standards of service - while maintaining rigorous controls, accuracy and customer satisfaction.

The client's benefits and payroll customers - both employer clients and individual participants - rely on quick, accurate and compliant support for issues that directly impact employees' pay, benefits and peace of mind.

Key challenges included:

- **High complexity:** Benefits and payroll queries often touch on regulated areas such as CDH accounts, COBRA, eligibility, disputes and carrier escalations.
- **Multi-stakeholder support:** Serving both Benefits Client and Benefits Participant audiences, each with different needs and expectations.
- **Service consistency at scale:** Ensuring every interaction reflects the client's service standards, even at high volume, across extended business hours.
- **Structured escalation and compliance:** Tier 1 needed to resolve as much as possible at first contact, while seamlessly escalating complex issues to Tier 2 without friction for the customer.
- **Visibility and control:** The client needed detailed customer interaction records, robust quality assurance, and KPIs that could be monitored across both the team and individual agents.



How We Built It

iContact BPO implemented a dedicated outsourced tier 1 support team for the client's Benefits and Payroll customers, designed around People, Process, and Performance.

1. Frontline Representatives: Specialist Tier 1 Support

iContact's representatives are trained to develop and maintain deep knowledge of the client's benefits products and platform, enabling them to:

- Respond to customer inquiries via telephone, email and chat.
- Address Tier 1 questions on benefits products, enrolment, eligibility, navigation and general support.
- Document every interaction in the client's Salesforce instance, including inquiry details, actions taken, and outcomes.
- Resolve Tier 1 issues end-to-end and communicate solutions clearly to customers.
- Offer preventive recommendations to reduce repeat contacts and deflect avoidable future issues.
- Identify and escalate complex inquiries that require Tier 2 intervention.

This ensures that routine and moderately complex issues are handled quickly at the first line, while protecting the bandwidth of the client's Tier 2 specialists for high-complexity and dispute-driven cases.

2. Leadership: Embedded Operational Excellence

iContact's leadership plays a pivotal role in ensuring the team operates to the client's standards:

- Role modelling excellence: Leaders set the tone on attendance, attitude, and performance.
- Goal setting & prioritisation: They establish daily priorities, set team goals and assign tasks aligned to the client's KPI framework.
- Escalation management: Leadership acts as the first point of escalation for customer issues, managing work queues and ensuring swift resolution.
- Hands-on support: Leaders handle escalated or complex calls directly, assisting agents in real time and stepping in where required.
- Training & enablement: They contribute to the development and implementation of training materials, procedural guides and best practices.
- Coaching & Quality Assurance: Leaders mentor team members, support onboarding, conduct Quality Assurance checks and provide constructive feedback to strengthen skills and consistency across the team.

This combination of frontline expertise and strong operational leadership allows iContact BPO to manage a complex, multi-queue support environment and is a mainstay of our success in CX outsourcing.

Operating Model & Workflows

Phone and E-mail Support

iContact BPO is responsible for handling all calls to Benefits Support during standard business hours (Monday - Friday, 8am–7pm EST), across two dedicated phone queues - Benefits Client (employer) and the Benefits Participant (employee).

Full documentation of every call is captured as a Salesforce case, ensuring end-to-end visibility and traceability. For email interactions, a Salesforce case is created for every incoming email and routed to a Benefits Support Tier 1 case queue.

Tier 1 vs Tier 2: Clear Scope & Escalation

Tier 1 support is designed to resolve interactions that can be immediately addressed and closed without requiring extended investigation or specialised interventions. Where issues require specialist intervention or carry higher risk, iContact BPO escalates to Tier 2 Benefits Support.

iContact's escalation processes are built to ensure that customers are never "lost" between tiers and to sure a seamless customer experience. Agents follow a structured and highly disciplined case escalation process. This disciplined approach to escalation helps protect customer experience, reduce friction, and maintain strong governance over complex, regulated workstreams.

Performance Framework: KPIs That Reflect Complexity & Quality

The client and iContact BPO run the operation against a rigorous KPI framework. Metrics are tracked at both team and individual level and reviewed regularly by leadership.

Where performance dips, iContact leadership provides targeted coaching, and formal performance management where necessary. This ensures a high-performing, accountable team that consistently aligns to the client's expectations.

Impact: Enterprise-Grade CX for Complex Benefits Support

By partnering with iContact BPO, the client has:

- Extended its CX capability with a dedicated Tier 1 team that understands the nuances of benefits, payroll and compliance.
- Maintained high service standards across phones and email, anchored in quality scores, CSAT and first contact resolution.
- Protected Tier 2 capacity by resolving a high proportion of issues at Tier 1 while routing complex cases via structured escalation paths.
- Improved visibility & reporting through disciplined case documentation in Salesforce and consistent KPI governance.
- Delivered a smoother experience for both employer clients and individual participants, even on complex benefits journeys such as CDH and COBRA.

iContact BPO's ability to manage complex, multi-queue, compliance-sensitive customer service portfolios on an outsourced basis is unsurpassed.

With strong domain understanding, tight operational leadership, robust processes and escalation workflows, and a disciplined performance framework, iContact BPO provides a scalable, high-quality Tier 1 support layer.