



Heartland Payments

Title: Professional Services Process Improvement

Subtitle: Assessment, Findings, Recommendations and Implementation

The Opportunity: As a fast-growing company taking on many new customers, Heartland Payments' Professional Services (PS) organization struggling to both support existing customer needs and be available to onboard new customers. PS Leadership felt constrained to stay within current budget and use current processes. The acquisition by Global Payments further emphasized the pressure to perform.

The Challenge:

- Unhappy Customers
 - New Customers: target onboarding dates were frequently missed with quality issues during the onboarding process
 - Existing Customers: frustrated with length of time it took to fulfill support requests and resolve issues
- Burned out Professional Services Associates
 - Current organization structure does not properly meet needs
 - Decision to not add staff resulted in more work for the existing staff
- "We've always done it that way" mindset within Professional Services leadership

The Solution:

- Assessment of current environment
- Documented Findings and Recommendations
- Implemented Improvements

The Results:

- PS Leadership accepted the Findings and Recommendations, then engaged Brightwater to enact improvements
- Implemented improved Customer Onboarding process, improving efficiency 50%
- Implemented improved process for scheduling internal Heartland resources to implement Heartland technologies to new Clients, resulting in a 75% improvement in onboarding success
- Implemented improved Client Retention processes for existing Clients, resulting in a 75% decrease in attrition