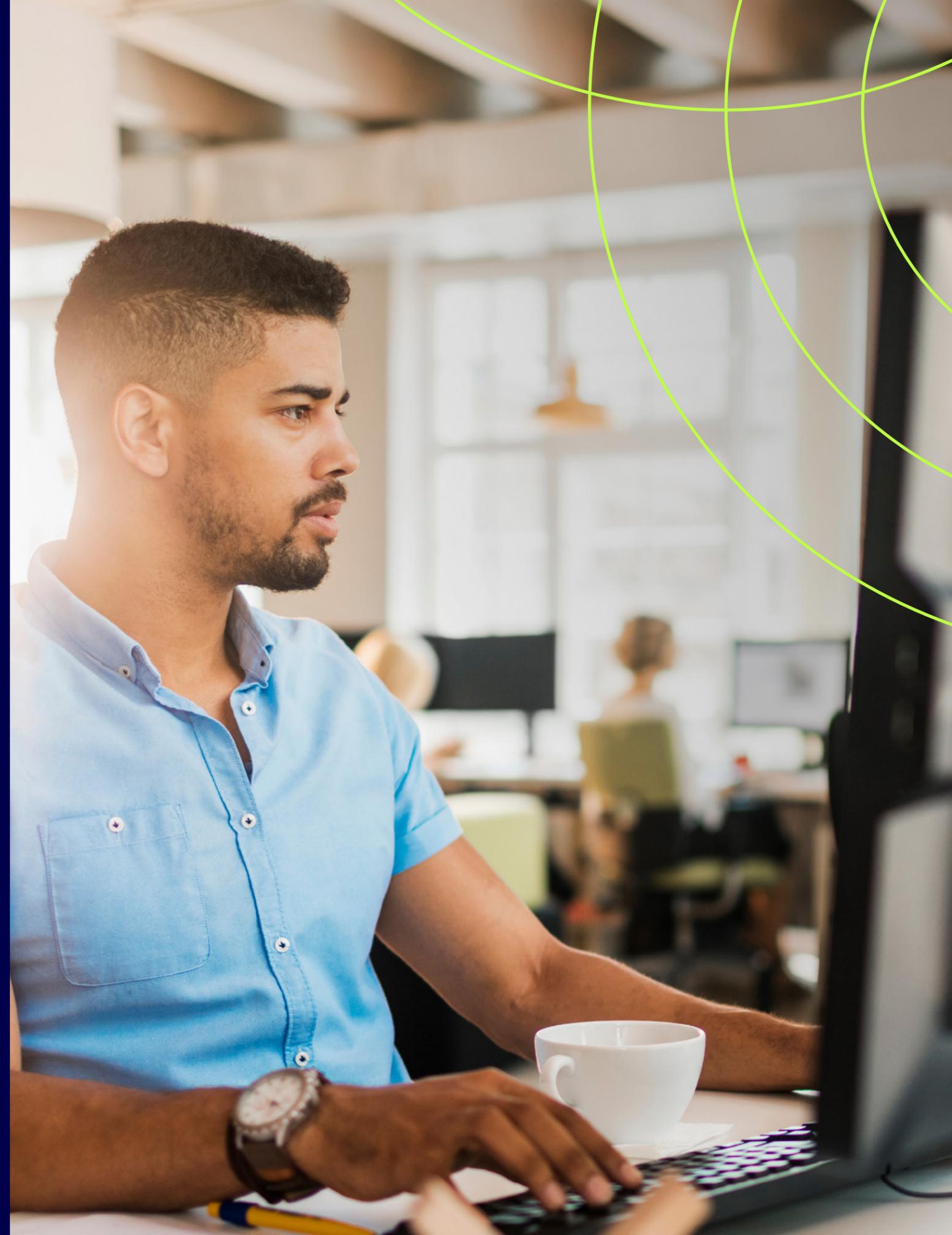




CASE STUDY

# How USAA Optimizes Social Customer Care for Greater Efficiency



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USAA's members expect excellence in customer service from a financial services organization that has served generations of military families.

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Heather Cronin

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Executive Director, Social Business, USAA

# Executive summary

The USAA family of companies provides insurance, banking, investments, retirement products and advice to over 12 million current and former members of the U.S. military and their families. Known for its legendary commitment to its members, USAA is consistently recognized for outstanding service, employee well-being, and financial strength. USAA knew that social was their customers' channel of choice for servicing needs, but it was growing harder to reach their goal of reducing service costs across multiple business units while providing members a superior experience. To counteract this, USAA created a social media management strategy that drives social support savings initiatives and leveraged the Khoros platform to put their strategy into practice.

Before using the Khoros platform, USAA's agents were bogged down in manual social customer care documentation processes and a manual workflow. The time it took agents to record results sidelined them from working on other cases, leading to longer support wait times for USAA customers. Adding to the delays, important and frequent support processes like member identity validation and conversation routing to agents were not fully automated.

These issues made it exceedingly difficult to achieve USAA's support savings cost reduction goal and maintain their service level agreements (SLAs). USAA began by determining the efficiency of social service processes with the identification of USAA's Enterprise Social Customer Care SLA across multiple business partners. Next, USAA worked with Khoros to implement a social media management platform with time-saving features including real-time member name to social handle match and advanced agent routing techniques. Lastly, by integrating platform data into their Client Relationship Manager (CRM), USAA created a cross-channel 360 degree view of their members that allowed personalized and seamless experiences.

Working together, USAA and Khoros implemented Social Customer Care MSI (Member Service Index) in 11 major business units with six financial service business teams and trained 104 users in two days. As a result of onboarding Khoros and adopting their new social media management support strategy, USAA removed 25+ manual process while also realizing cost savings and 99% time on task savings. Today, USAA's customers are receiving care more quickly and the social service business units are functioning efficiently.

# How they made it work

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## Created

a social media management support strategy to drive support savings and executed it with the Khoros platform

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## Integrated

platform data into their Client Relationship Manager (CRM) to create a cross-channel, 360 degree customer view for seamless service

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## Customized

the platform with features that improved customer experience, including real-time member name to social handle match and advanced agent routing

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## Drove

support savings by removing 25+ manual processes including manual internal social customer care documentation

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# Results

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USAA was able to meet their members' social customer service needs with speed and efficiency while realizing cost savings to help social service business units function more efficiently. Due to the platform's integration with USAA's CRM, members also received a more personalized and seamless experience. The net result of onboarding the platform and implementing their social media management support savings plan was a reduction in time on task for business processes and Full-time Equivalent (FTE) savings.

99%

time-on-task savings  
with improved processes

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91%

member  
service index

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+90%

efficiency in member  
community management  
and response

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We cut down the time it takes for internal social customer care documentation from 24 hours to 1 hour—a 99% time on task savings!

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Heather Cronin

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Executive Director, Social Business, USAA