

Case study:

Making postgraduate education accessible through Whatsapp.



Fast Facts

Industry: Education.

Region: Mexico and Latin America.

Services: Customer service via WhatsApp and integration with other channels.

Benefits:

1. Flexibility to meet customers where they are in their own terms.
2. Ability to support text messaging, calls, video calls, and document transfer in a single platform.
3. Agility to keep leads warm until the perfect offering is available.

Case Study: Making postgraduate education accessible through Whatsapp.

Overview

We partnered with one of the most important universities in Mexico and Latin America to make education more accessible through an instant messaging app that 57.2 million Mexicans already use: WhatsApp.

The aim was to make postgraduate education more accessible through the deployment of an omni-channel customer service model, and, although the integration of WhatsApp was a mere suggestion in the initial negotiations between our company and the institution, it quickly gained traction and became a project that took a life of its own, since it required a complete reimagining of the way customer service was being provided at that moment in time.

The Challenge

The institution originally approached us to help improve its service and its control of prospects for its offer of postgraduate education programs, including master's degrees, MBAs, and various seminars and certifications. This offer is available to current alumni, former alumni, and the general public and in both on-premises and online modes.

In the original plan, we would manage inbound conversations through an 800 number and provide the pertinent information to interested prospects coming from Mexico and all over Latin America, handing over qualified leads to the internal enrollment teams at the various campuses the institution operates all over Mexico and some other Latin American countries. At some point during the negotiations one of our executives suggested adding a dedicated WhatsApp number exclusively for this purpose, highlighting its popularity – 57.2 million users in Mexico alone in August 2019, according to [Mexican journal El Universal](#) – and its features, which include voice messaging, and document support.

The use of WhatsApp as a means of communication, while popular among the general population for the past years, and proved massively successful for small to medium companies in Mexico – [according to Forbes Mexico](#), 65% of the small companies who use WhatsApp consider it important in growing their business – has only been included in the customer service mix for bigger Mexican organizations as recently as only one to two years ago (with the introduction of WhatsApp Business in Mexico) with various degrees of success and in only a handful of sectors. For this particular institution, the use of WhatsApp as a tool not only to provide customer service, but actively enroll new alumni was up to this point unprecedented.

We came to an agreement that we would start using WhatsApp in such a way that a prospect could start an interaction in one of them and seamlessly continue it in another if chosen to do so; this way we would be able to oversee the flow of communications, give fast and accurate answers when prompted, and thus achieve the overall optimization of the enrollment process, which in turn would help increase the number of people enrolled. And since there was no precedent, it was decided it would be a joint effort between our company and the institution, whose enrollment experts all over Mexico and Latin America would complete the process.

In Mexico, 82% of small businesses that use WhatsApp think that the application helps them communicate with their customers and 65% believe that it helps them grow their businesses.

FORBES México.

The Solution

As an instant messaging platform, WhatsApp is robust, agile, supports phone calls within the app, is able to support rich media – such as photos, videos, voice notes, and animated gifs – as well as the transfer of documents in a variety of formats. What this means in practice, and from a customer service standpoint, is that a single platform is able to take on the duties and functions of at least two more traditional ones, in this case telephone and email, with half the effort and associated costs of implementation in the whole Latin American region. Added to this, there's also the tendency of younger generations to prefer alternative means of communication to more traditional ones, and it was vital to the institution to keep a communication line that was appealing to the preferences of the end customer.

Overall, the project was divided into the following phases:



Analysis

We analyzed the channels used by the institution in that moment, both from a technology and workflow standpoint in order to determine how best to proceed with the rest of the project

Tool Development

supported by our analysis, our IT team developed a tailor-made WhatsApp tool using open source technology in order to achieve full customization and a seamless integration of both our customer's architecture and our own.

Planning and Integration

along with our customer, we designed the workflow through which the interactions would run, always keeping in mind that all interactions received through WhatsApp would have to be followed up in-platform and picked up or concluded in the end customer's chosen channel. These workflows included the ability to keep track of "warmer" leads,

Implementation

Once the channel was opened to the public, we have consistently implemented a continuous monitoring of all quality standards throughout all interactions. If any deviation is detected, we are able to know via our system and immediately implement corrective actions. If the system itself presents an area for improvement, any adjustments can be made without disrupting the operation, and all changes will be reflected within 3 hours.

Apart from all these actions our HR team tailored hiring practices to include a writing proficiency test, not only in regards to spelling and grammar, but making sure the typing speed was satisfactory and sufficient to manage up to 3 simultaneous conversations.

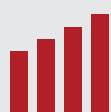


Benefits

- More qualified leads.
- Inclusion of prospects of the Millennial generation, engaging them on their own terms in their own time.
- Eliminating carrier cost barriers should the initiative be expanded to the whole Latin American region where the institution has presence.
- The very nature of the platform and the service we are providing, added to the fact that it was fully developed by our in-house team, made it possible for the WhatsApp team to be the first people in the company to migrate to home office when lockdown measures were implemented when the first wave of Covid-19 hit the city of Monterrey, state of Nuevo León, where both the customer and the team are located. This was fully achieved in just around 72 hours and no service interruptions happened during or after the migration.

The Results

The channel and the initiative as it were planned and agreed upon began implementation in March 2019. Once the application was tested and approved for use, deployment took only two weeks, and it serviced Mexico and other Latin American countries such as Colombia, Peru, and Ecuador. All KPIs for the WhatsApp channel had established goals and were monitored especially closely since we had no actual benchmark to measure them against.



KPI



Goal



Result

Net Promoter Score

90%

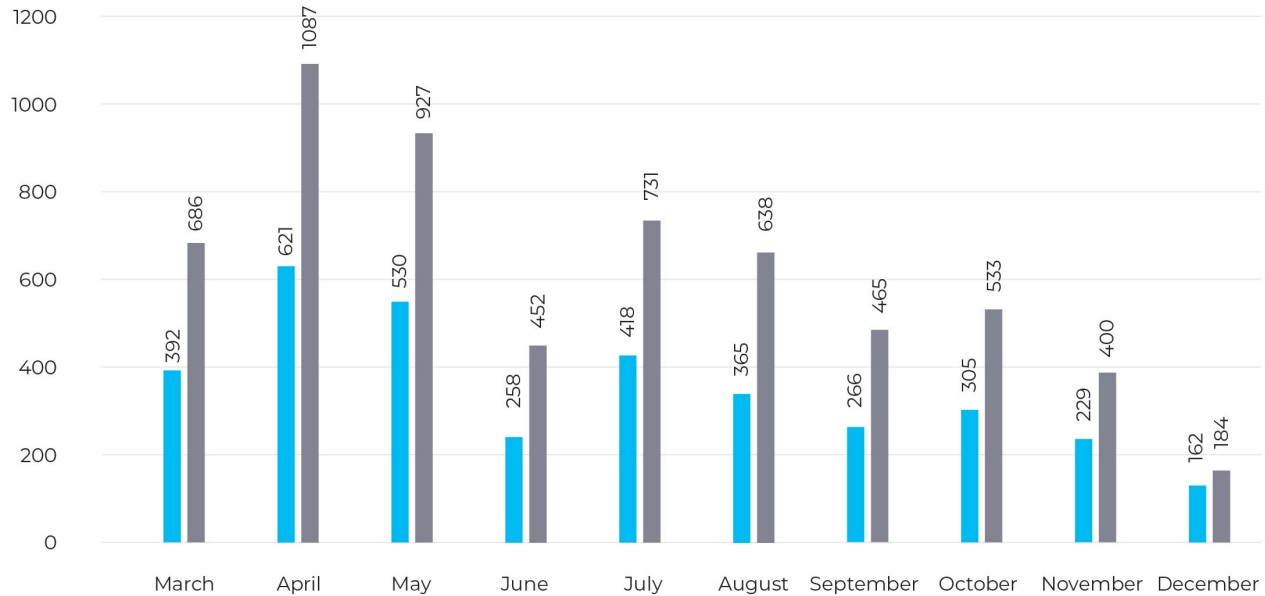
90%

Enrollment

3,545
registrations

6,203
registrations

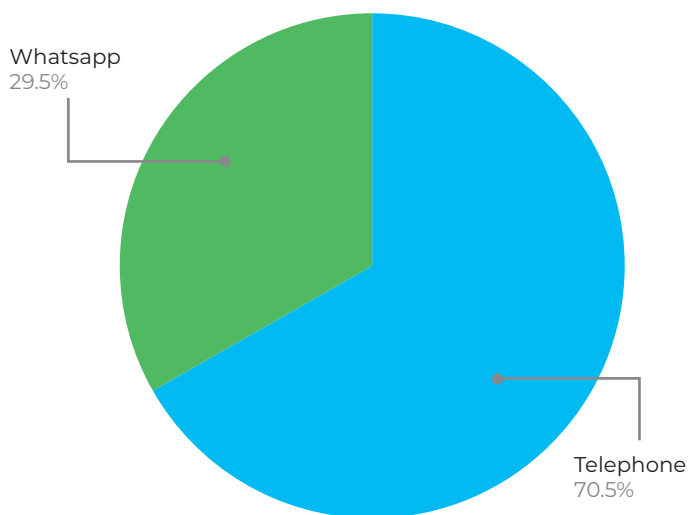
Total enrollment before and after Whatsapp implementation



75% increase of enrollment on average every month since the implementation of the new mix of channels in March to December 2019, even in the months where enrollment tends to be lower, such as the end of the year. (Telephone + WhatsApp)

Measuring against the telephone

To learn more about the effectiveness of the new channel and its acceptance with its intended public, we can measure performance against a traditional channel, which in this case is a good old-fashioned telephone line.



During 2019, the telephone channel reported 80.3K interactions, and the WhatsApp channel reported 33.6K interactions. This means that, in its first year, the initiative processed 113.9K interactions on various channels from all over Latin America, a third of which were conducted through a channel that had never been used in that context up to that point.

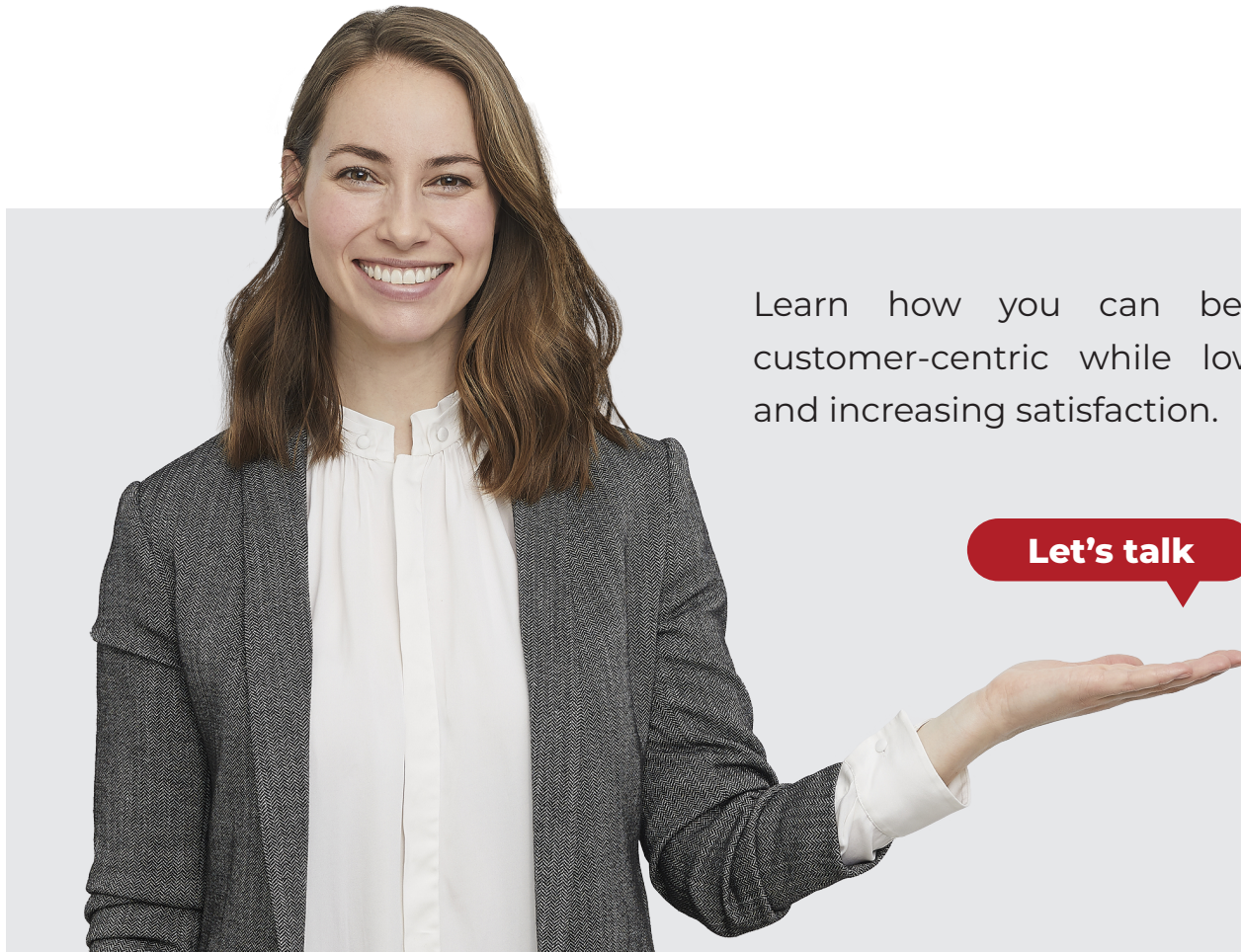
A lot of this was due to the timely follow ups our team did to keep leads warm and customize the prospects' experience based on the programs they show interest in, through the channels they prefer. This has proven to be especially relevant in the times of coronavirus, which has forced the Institute to find alternatives to physical classrooms and reschedule all kinds of postgraduate programs, seminars, workshops, and certification exams, and migrate to on-demand options and a "live" format via video conferencing.

Now, since lockdown in Mexico is expected to last for at least another few months in most states, including Mexico City, the Institute made the decision to temporarily pause the use of WhatsApp to engage with the prospects, citing the need to sacrifice agility for closeness and a more humane element in face of the current situation. We are

expected to resume operations in the WhatsApp channel once the Institute has reworked its strategy to tackle education in the next normal.

Thanks to the results obtained, we are now evaluating strategies alongside our client to increase the scope of the services provided to prospects, students, and alumni, with the final goal of optimizing even more the interaction between the different channels, and be able to guarantee a satisfactory experience every time.

What started as an experiment evolved into a true force of change for us and our customer, one which will be able to meet the expected boom in demand for alternative channels in a time when we need more flexibility than ever before.



Learn how you can become more customer-centric while lowering costs and increasing satisfaction.

Let's talk

About Anexa BPO

We're a Mexican company with over 20 years' experience in offering tailored solutions to a wide variety of companies to help them accomplish diverse business goals, whether they be centered around customer experience or by acting as a strategic outsourcing partner. Through the integration between technology, processes, and human talent, we are committed to transform customer service into meaningful experiences. We aim to provide the best solutions for customer service and experience using tools that are close to the customers, engaging them in their own terms, at their own time.

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