

Proposal of customer service strategies for a micro tax and financial consulting firm**Propuesta de estrategias de servicio al cliente para una micro empresa de consultoría fiscal y financiera**

ANDREW-SOTELO, María Elena†*, SOSTRES-FLORES, Paula Alejandra and DURÁN-MORALES, Carlos

Universidad Tecnológica de Chihuahua. Montes Americanos 9501, Sector 35 C.P. 31216 Chihuahua, Chih.

ID 1st Author: *María Elena, Andrew-Sotelo* / ORC ID: 0000-0002-5322-7634, CVU CONACYT ID: 520369

ID 1st Coauthor: *Paula Alejandra, Sostres-Flores* / ORC ID: 0000-0002-3340-7988, CVU CONACYT ID: 520432

ID 2nd Coauthor: *Carlos, Durán-Morales* / ORC ID: 0000-0002-2348-2802, CVU CONACYT ID: 875848

DOI: 10.35429/EJRP.2019.9.5.38.47

Received July 30, 2019; Accepted December 18, 2019

Abstract

Proposal about Strategies of Customer Service to a Micro Company in Tax and Financial Consulting. Purpose: To increase company's competitiveness, developing customer service digital strategies in a micro company in Chihuahua City, which is dedicated to perform activities that are focused in areas such as: business consulting in IT, Corporative Finance, Marketing, Corporative Image. Method: This research is exploratory, since this, realize an analysis of the company's current situation, this is performed through an interview for the owner of the company. Also it uses a qualitative method, since a group session realized with current customers, and also quantitative and descriptive method uses through an applied questionnaire to specific market segment. Results: To obtain the automatization of training process for each employee who are involved on the sales process/ telephone attention. Since the employees have available information, the person in charge to provide the customer service or any other person in the company, will be able to know accurate operation related to the problem that the user has, as well as, new employees will be able to know easily the sales process, after sale service, in order to provide better attention, more easy and effectiveness through the digital communication tools.

Resumen

Propuesta de Estrategias de Servicio al Cliente para una Micro Empresa de Consultoría Fiscal y Financiera. Objetivos. Aumentar la competitividad a través del desarrollo de estrategias digitales de servicio al cliente, para una micro empresa dedicada a actividades que se enfocan a las áreas de consultoría de negocios en Tecnologías de la Información, Finanzas corporativas, Marketing e Imagen corporativa de la ciudad de Chihuahua. Metodología. La investigación es exploratoria, se realiza una entrevista a la propietaria de la empresa. Cualitativa, porque realiza una sesión grupal con clientes actuales, y cuantitativa descriptiva porque se aplica un cuestionario a un segmento del mercado específico. Contribución. Se espera obtener la automatización del proceso de capacitación para cada empleado involucrado en el proceso de venta y atención telefónica. Al contar con la información disponible permite al encargado de servicio al cliente o a cualquier persona de la empresa, conocer la operación correspondiente a la problemática que presente el usuario. También de esta forma los trabajadores de nuevo ingreso podrán conocer fácilmente el proceso de venta y postventa, y brindar atención de una manera más fácil y efectiva a través de herramientas de comunicación digitales.

Strategies, Sales Process, Customer Service**Estrategias, Proceso de Ventas, Servicio al Cliente**

Citation: ANDREW-SOTELO, María Elena, SOSTRES-FLORES, Paula Alejandra and DURÁN-MORALES, Carlos. Proposal of customer service strategies for a micro tax and financial consulting firm. ECORFAN Journal-Republic of Peru. 2019. 5-9: 38-47.

* Correspondence to Author (email: mandrew@utch.edu.m)

† Researcher contributing first author.

Introduction

The fundamental objective of any organization is to obtain profits, and these are obtained through sales. One of the key pieces in the companies is the client, it is the one that generates the profits in the company. One of the basic points in all Mpyme that makes the difference between one and the other, is how the survey is carried out, the attention that is given to the client, how it is retained and the after-sales service, this allows the company to keep it captive. AlphaCenit S.A.P.I. It is a company formed by a multidisciplinary group, its activities cover the areas of business consulting in IT, Corporate Finance, Marketing and Corporate Image focused on the competitive needs of Mexican micro and small businesses.

The project aims to help the company in the development of a clear and agile customer service process for TiConta (an electronic invoicing software). The customer service system gives timely attention to users, prospects or anyone interested in using TiConta. This explains how to address technical support issues, clarifications on the use of the tools and help clarify any questions that may arise from users. The company is characterized by always keeping elements of Business Intelligence combined with the areas of Finance and Marketing Strategies, generating greater competitiveness for our customers and always seeking the democratization of Information Technology.

Located in the city of Chihuahua, Chihuahua since 2008, AlphaCenit is a company that has been offering business solutions for almost 10 years through training and consulting, covering various business sectors; primary, various industries such as metalworking, agribusiness, graphic arts among others in addition to the commerce and services sector always seeking value creation and competitiveness for MSMEs. Currently AlphaCenit has served more than 5000 companies throughout the country maintaining a constant collaboration with municipalities and business chambers.

Literature Review

Customer service. It is necessary for companies to clearly identify the importance of the client and be attentive to how they think and how they perceive the organization.

A customer is the one who accesses a product or service through a financial transaction (money) or other means of payment. (KOTLER, 2003). Based on the importance of the client, it is necessary to mention customer service as a strategy to maintain their loyalty to the company. Customer service is the set of activities related to each other offered by a company in order for the customer to obtain the product at the right time and place and ensure their total satisfaction with the use of it. (KOTLER, 2003). Customer service is "all activities that link the company with its customers" (Couso, 2005). Customer service is not an option, it is an essential activity for the life of a company, it is the center of its objectives and is the key to success or failure.

Micro, small and medium enterprises

SME Companies (small and medium) constitute a very important part in the economy of the countries. According to the Organization for Economic Cooperation and Development (OECD) (2006), they are a way of organizing business that currently dominates, and account for between 95 and 99% depending on each country. They create about 60 to 70% of net jobs in OECD countries. SMEs are entities that have productive flexibility, have high generation of jobs, adapt to market changes and are able to reconvert their strategies and business structure, so their promotion is justified if the strategic importance of they have in globalization (Francisco J. Fernández Regalado, 2013). The Economic Census aims to provide statistical information that contributes to decision-making, INEGI makes the breakdown of the stratification of companies according to the criteria of employed personnel. For the analysis of this study, micro, small and medium enterprises are defined. (INEGI, 2009).

Classification	No. of workers	Sector
Micro	0-10	Industry
	0-10	Commerce
	0-10	Services
Little	11 – 50	Industry
	1 1– 30	Commerce
	11 – 50	Services
Median	51-250	Industrial
	31-100	Commerce
	51-100	Service

Table 1 Mpymes classification criteria
Source: own elaboration with data from INEGI (2009)

Trends in the use of technology to provide Online Customer Service for SMEs

According to some recently published articles (konfio.mx/tips/negocios/las-tendencia-en-tecnología-para-las-pymes/) the importance of the use of technology for small and medium enterprises is recognized as a strategy for that they may be valid and take advantage of solutions to improve in different areas. Mentioned among these trends are Computer Security, Robotics, 3D Printing, Virtual Reality, Online Training, Online Payments, Big Data and Artificial Intelligence as some in which companies can access. The MyPes can, through the use of some of them, perform tasks and analyze information, as well as free up staff time and an important part of the work organization and service improvement. (Konfio, 2019)

WhatsApp Business is an application that entrepreneurs can use to have direct and fast contact with customers and prospects. The download is free is available for Android and iPhone operating systems, it has been specially developed for small and medium businesses. The purpose of WhatsApp Business is to facilitate interactions with customers as it allows you to quickly automate, organize and respond to messages. It has been designed to work similar to WhatsApp Messenger like sending messages and photos. (FAQ de Whatsapp , 2019)

What is a buyer person?

An ideal buyer person or customer is that prospect in which the company will focus all its effort, they are the ideal of customers. It is the profile that is created of the customer to attract and retain it through the development of products, sales strategies, are all those activities that are carried out to identify the ideal customer and develop the profile: buyer person. (Batalla, 2018)

Analysis of the current situation

In order to determine the situation of the company, a questionnaire is made to the Marketing Manager.

Questionnaire to know the microenterprise situation.

1. What does your company do very well, better than many others? Democratize business software, that is, develop software that gives small entrepreneurs tools.
2. Is your company strong in the market or in the segment it points to? Why? We are venturing, we are not leaders, but we are developing marketing strategies to reach the target market.
3. Is your team committed to the company and the future vision? Yes, we all know what the goals and objectives are, we work under tasks with specific times to achieve them.
4. What things are your business not doing well, even worse than others? We have fought in the commercial part; it is our biggest area of opportunity.
5. What are the reasons behind the existing problems? I think the fact of focusing on the sale through the internet, without seeing that the page needed to be improved to make the shopping experience easier, also needed to define the segment to make specific advertising campaigns for them.
6. Do the defects come from the hand of insufficient resources or a bad allocation of them? It may be, at the beginning we did not have a defined budget for this area and the people we had were very little compared to the development area, now we have the support of an external designer and advisor, in addition to two people within the business.
7. Is the market in which your company operates growing? Yes, software and technology are the areas with the greatest growth potential for the coming years.
8. Do the products or services satisfy consumer trends or could they adapt to do so? If they satisfy consumption trends, small entrepreneurs need to rely on technology to automate processes, information flows and to spend more time on tasks that generate value for their businesses. Our proposal is that the entrepreneur has important information (hard data) of his business for informed decision making.

- 9. Are there new technologies or changes in the regulatory framework that your company can take advantage of? Yes, adapting to new technologies, that people are accustomed to using the internet from their cell phone or computer helps us.
- 10. What things do competitors do better than your company? They have already made their way into the market and market their services constantly.
- 11. Are there new technologies or consumer fashions that threaten the future of your products or services? There will always be competition, so it is essential that our marketing plan has solid foundations, as well as all the well-developed support and service to achieve a good user experience and prefer our solutions.

Analysis of the responses through a SWOT

<p>S1. The target market is well identified. S2 The entire work team is committed to meeting the goals and objectives of the company. S3 Democratize business software.</p>	<p>O1 The company's market is in the area with the greatest potential growth for the coming years. O2 Market demands new software services.</p>
<p>W1 Deficiency in marketing. W2 The purchase method can be confusing. W3 Little staff for the customer service area. W4 Lack of knowledge to serve the client.</p>	<p>T1 Competitors already market their services constantly. T2 Structuring of privacy notices and terms of use. T3 The constant development of competition.</p>

Figure 1 SWOT analysis
 Source: own elaboration

The AlphaCenit company is at a favorable point for its systems since both technology and the target market are growing. Chihuahua has 27,441 microenterprises and represents 4.39% of the total in Mexico. The small business is 1,933 and represents 4.19% of the total nationwide and the company plans to take advantage of this percentage with the democratization of its business software. (INEGI, Directorio Estadístico Nacional de Unidades Económicas , 2018)

Satisfaction survey of active clients and customers who did not renew TiConta contract

Encuesta satisfacción

CLIENTES ACTIVOS TiConta

Nombre del cliente

Tu respuesta

1. ¿Cómo le ha parecido nuestro servicio?

Tu respuesta

2. Cuando hizo la contratación o renovación de su cuenta, ¿Cómo le pareció el tiempo de respuesta?

Tu respuesta

3. ¿El servicio cumplió la calidad que esperaba?

Tu respuesta

4. ¿Cómo fue su experiencia para acostumbrarse al uso de la plataforma?

- Fácil
- Regular
- Difícil

¿Por Que?

Tu respuesta

5. ¿Recomendaría TiConta a un amigo o conocido? ¿Por qué?

Tu respuesta

6. ¿Tiene algún comentario o recomendación para que mejoremos nuestro servicio?

Tu respuesta

ENVIAR

Figure 2 Satisfaction survey for active clients
 Source; own elaboration

The results presented below are obtained from the responses of 10 surveys, corresponding to 15% of customers (approximately 66 customers) who no longer renewed their electronic billing package.

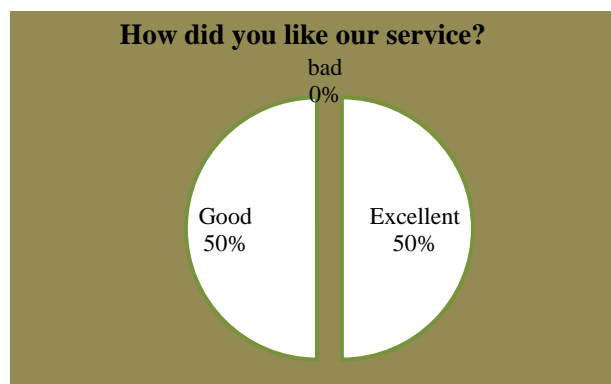


Figure 3 Survey for TiConta active customers
 Source: own elaboration

50% of TiConta customers believe that the service offered by the software is excellent and the other 50% say it is good.



Figure 4 Survey for TiConta active customers
Source: own elaboration

Among the active clients of TiConta who were surveyed, 67% found that the response time is fast, followed by 33% who consider it good.

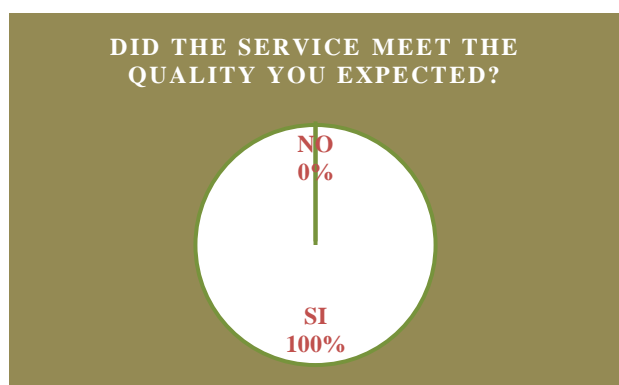


Figure 5 Survey for TiConta active customers
Source: own elaboration

100% of the total active TiConta customers consider that the quality of service is what they expected.

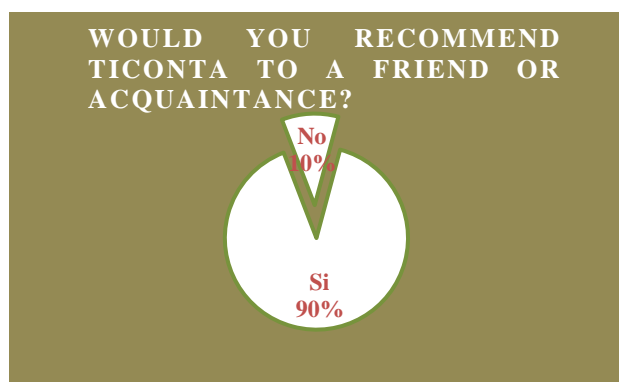


Figure 6 Survey for TiConta active customers
Source: own elaboration

Active TiConta customers were asked, if they would recommend the Software to a friend or acquaintance, 90% said yes. Question six, do you have any comments or recommendations to improve our service? most mentioned that in general the service is fine.

ENCUESTA DE SATISFACCIÓN

ENCUESTA CLIENTES QUE YA NO RENOVARON TICONTA

Nombre
Tu respuesta

¿Como le pareció nuestro servicio?
Tu respuesta

¿Cuál fue la razón por la que no renovó su cuenta?
Tu respuesta

¿El servicio cumplió la calidad que esperaba?
Tu respuesta

¿Cómo fue su experiencia para acostumbrarse al uso de la plataforma?
 Fácil
 Regular
 Difícil

¿Por que?
Tu respuesta

¿Recomendaría TiConta a un amigo o conocido? ¿Por que?
Tu respuesta

¿Tiene algún comentario o recomendación para que mejoremos nuestro servicio?
Tu respuesta

ENVIAR

Figure 7 Satisfaction survey for customers who have not renewed
Source: own elaboration

The results presented below are obtained from the responses of 10 surveys, corresponding to 15% of customers (approximately 66 customers) who no longer renewed their electronic billing package.

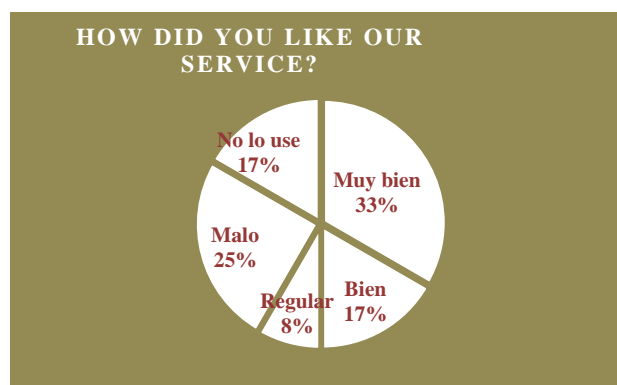


Figure 8 Survey for customers who have not renewed TiConta
Source: own elaboration.

Of the total of the respondents, 33% consider the service to be very good, 17% that it is a good service, 8% consider it regular, 17% did not have the opportunity to use it for various problems regarding data prosecutors and 25% that is bad.



Figure 9 Survey for customers who have not renewed TiConta

Source: own elaboration

37% of the respondents answered yes, as to whether the software offered them the quality they expected against the 36% who responded that it was not, along with 27% of them who did not have the opportunity to use it.

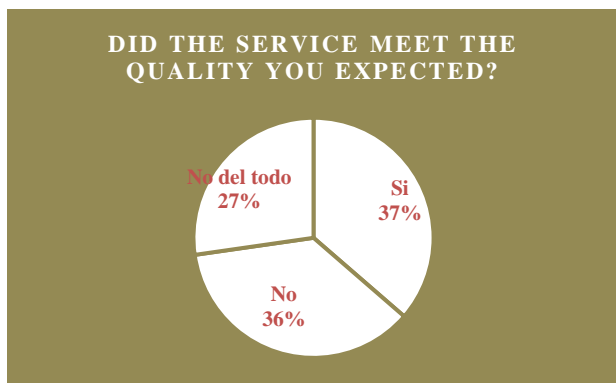


Figure 10 Survey for customers who have not renewed TiConta

Source: own elaboration

37% of the respondents answered yes, as to whether the software offered them the quality they expected against the 36% who responded that it was not, along with 27% of them not totally. In total 63% are not satisfied with the service provided to them.

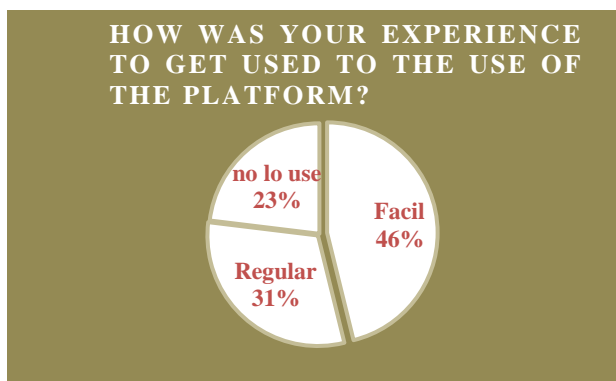


Figure 11 Survey for customers who have not renewed TiConta

Source: own elaboration

31% of the respondents consider that their experience to get used to the platform was regular since they already had knowledge of other systems similar to this and 46% that their experience was easy.

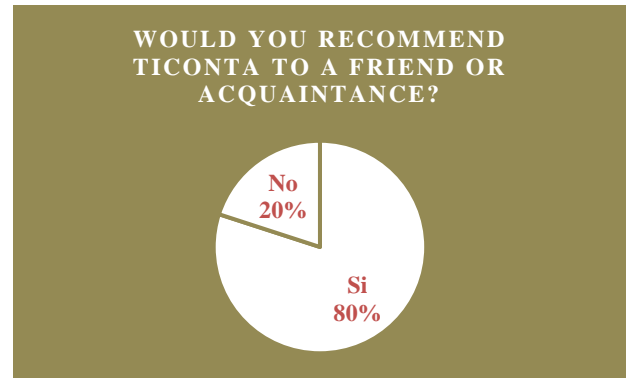


Figure 12 Survey for customers who have not renewed TiConta

Source: own elaboration

80% of respondents replied that if they would recommend the software to their friends or acquaintances and only 20% said no.

Question six, do you have any comments or recommendations to improve our service? -In a smaller percentage they ask for a cheaper package, and those who no longer renewed the reason is that they prefer not to pay the price of 290.00 per month or 2900.00 per year. Another opinion is that the system is easier to understand, There are other systems are free. Lack of time for training, lack of knowledge to hire the service again.

Group session with prospects

Six people were invited to participate in a group session, the characteristics of the participants is that they have their own business and perform billing, that they have never used TiConta (electronic billing software), who are unaware of its use. The objective of the group session is to know what your main concerns and problems are to solve. An observation of the panelists is performed interpreting their behavior and listening to their opinions, which will help to elaborate the proposals of customer service strategies. As an incentive to participate they will be given 15 days free to use TiConta.

The panelists attended the focus group with laptop, RFC of their business, password of the SAT (key cieci), data of some client to bill for example purposes (the invoice is not going to be stamped) and Certificate of digital stamp on your laptop (to be able to stamp invoices later, within 15 days)

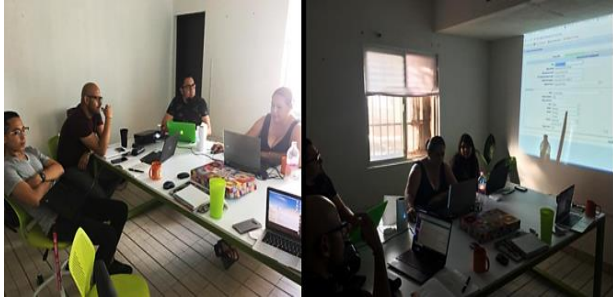


Figure 13 Group session
Source: own elaboration

Summary of the opinions generated in the group session

When entering the TiConta home page, they take a detailed tour and comment that you cannot see any option where they can configure the system or where all the information they initially entered is stored. They are asked to start by making an invoice. To what they say they do not see a button or a section that says billing and being a billing system seems more accounting.

They go to the catalog section and therefore to customers and suppliers, they register with customers and at the time of registration they omit the tax regime since they mention that a person without the corresponding knowledge would not know what the tax regime is. They mention that it is very annoying that Tico (the system mascot) appears every time they want to perform an action and that the names of each section are very technical for those who do not know the subject. They also comment that VAT should appear with the amounts and not by the name that corresponds to it since many do not know them.

The lack of commitment of employees to customer service, and advice to customers causes them not to seek again the service of the company AlphaCenit.

Research Methodology

The methodology is based on an exploratory investigation through an interview with the owner to identify the strong and weak areas of the company, as well as the opportunities and threats it faces. Qualitative research is also carried out with the application of a group session to active clients. And a descriptive investigation is also carried out with the application of a questionnaire to TiConta's active clients and to customers who have not renewed TiConta to measure the degree of satisfaction with the service. The google survey tool is used to prepare the questionnaire, the survey is of a telephone type.

Results

Data analysis provides important reasons for creating customer service strategies that allow AlphaCenit to keep its real customers captive and attract the potential market. The registration of the platform is online, as is the payment process, but it still does not have an efficient way to address the concerns of each of the users. For this reason, the development of strategies is proposed, where the process of a customer service system is established, which includes from the process of prospecting, sale and after sales service.

Customer Service Strategies

The following strategies are proposed as part of the sales process:

- Create a buyer person (ideal customer), with the information that is in the hands of the company, coming from currently active customers, which aims to send the right message to the right individuals and thus generate greater chances of success. (annexes figure 1)
- For the survey, the attendance list containing the data of the people attending the “financial Thursdays” talks in CANACINTRA, open to all public offered by the company, is used. These sessions are attended by small entrepreneurs, which belong to the segment to which TiConta is directed. Therefore, it is intended to identify them as potential customers.

- Go to the exhibitions that gather small entrepreneurs in order to collect their data for the prospectus base.
- Establish in detail the sales process, with the help of a CRM where all the contacts that are obtained in the prospecting are registered as a new lead and will be established within a new Sales Pipeline that is the process in which each One of them inside the sale. The database must have relevant information about the client or prospect: name, telephone number, personal data, up to a record of all the problems you have had throughout your history as a TiConta customer; with the purpose of carrying out an analysis of the most recurrent failures and complications, thus being able to locate in a short time the reason why they are caused and if it is a problem it is on the part of the customer service, the programming or an error of the client and give them a solution correct to the magnitude and type of the problem.
- Make a record of incidents where you must write when and how it was that the client reported the problem, what was the problem, how long it took to solve it and what was the attitude the client took before and after the care.
- Conduct a customer service program, which consists of two sections, telephone support and whatsapp support. The two sections detail the customer service process:
 - Process Block Diagram.
 - Description of the process steps.
 - Necessary resources.
 - System standards under what criteria and standards should the process be carried out?
 - Make a list of recurring problems with the possible solution to each one, specifying each step to follow for your solution.
 - WhatsApp Business: One of the activities carried out in the company was the change from WhatsApp Messenger to WhatsApp Business.

- The change of this application involved performing an analysis of all cell phone contacts. Since checking the truthfulness of the data, that the telephone numbers still belonged to the person who was in the registry, as well as locate the name of those who were not entered in the phone.
- Each contact was also backed up to ensure that no information was lost at the time of the change from WhatsApp Messenger to WhatsApp Business, since you cannot have both applications on the same cell phone.
- After making the change, all the benefits to which you have access with WhatsApp Business are used, some are:
 - create a company profile that allows you to give useful information to customers such as address, company description, email address Electronic and website. - Generate quick responses, allow you to save messages and reuse those that are sent frequently; In this way, common questions are answered in a very short time. - Organize contacts or chats with tags to find them easy and fast.

Annexes



Figure 14 Buyer company person. AlphaCenit elaboration

Acknowledgments

Appreciation for the information provided to the owner of the company the Marketing Manager, M.A.M. Cinthia Esmeralda García Valdez and student Diana Celeste León Morales for her participation in the development of the project.

Conclusions

As results, the increase in sales is expected during the first month of implementation and use of the different digital tools proposed, causing an increase in the profitability of the company.

The results can be observed in the comparison of the list of new clients in the month of July of this year, in perspective with the corresponding month of execution of customer service strategies. It is expected that with the use of the buyer person (ideal customer) a more successful profile of the company's customers can be developed, in order to send the correct message to them.

It is expected to increase the client portfolio with visits of businessmen in the "financial Thursdays" CANACINTRA and expo fairs. Through the prospecting and use of tools such as the CRM, it is expected to have an updated and functional database for classification. With the use of the incident log, it is sought to have the proper classification of the problem to deal with it in a more effective way and to provide a solution.

With the change from WhatsApp Messenger to WhatsApp Business, the telephone records of contacts with customers and prospects are updated, the authenticity of the information is validated. With the use of this tool, another personalized attention channel is created. It allows to elaborate a profile of the company and to answer frequent and / or common questions in a faster way.

An increase in customer acceptance is expected, in terms of operation and speed of response time of customer service. It is also suggested to the company, a periodic review of the strategies and measure the level of satisfaction in customer service.

References

Albrecht, K. (2018). *LA REVOLUCIÓN DEL SERVICIO*.

Batalla, D. d. (2018). el embudo de la conversión. En D. d. Batalla, *Marketing para las organizaciones del S. XXI* (págs. 47-61). España: FORMACIÓN ALCALÁ.

Couso, R. P. (2005). Servicio al cliente. En R. P. Couso, *Renata Paz Couso* (pág. 160). España: Ideas Propias Editorial S. L.

debitoor. (s.f.). *debitoor*. Obtenido de Glosario de contabilidad: <https://debitoor.es/glosario/definicion-factura>

FAQ de Whatsapp. (2019). Obtenido de FAQ de Whatsapp : <https://faq.whatsapp.com/es/android/26000092/?category=5245246>

Francisco J. Fernández Regalado, M. E. (Noviembre de 2013). *www.chi.itesm.mx*. Obtenido de *www.chi.itesm.mx*: <http://www.chi.itesm.mx/investigacion/wp-content/uploads/2013/11/NEG39.pdf>

Gómez, E. (15 de Febrero de 2018). *flame analytics*. Obtenido de <https://flameanalytics.com/artistas-invitados/que-habilidades-debes-tener-para-ser-el-mejor-en-atencion-al-cliente/>

Inc., W. (2019). *WhatsApp*. Obtenido de <https://faq.whatsapp.com/es/android/26000092/?category=5245246>

INEGI. (Noviembre de 2009). *Micro, pequeña, mediana y gran empresa*. Obtenido de Micro, pequeña, mediana y gran empresa: https://www.inegi.org.mx/contenidos/programa/s/ce/2009/doc/minimonografias/m_pymes.pdf

INEGI. (JULIO de 2018). *Directorio Estadístico Nacional de Unidades Económicas*. Obtenido de Directorio Estadístico Nacional de Unidades Económicas : Directorio de empresas y establecimientos - Inegi

Konfío. (5 de junio de 2019). Obtenido de konfío: <https://konfio.mx/tips/negocios/las-tendencias-en-tecnologia-para-las-pymes/>

KOTLER, P. (2003). CLIENTE. En P. KOTLER, *Fundamentos de Marketing* (pág. 712). MÉXICO: PEARSON.

Ramírez, A. (14 de Agosto de 2018). *¿Cuáles son las diferencias entre el servicio al cliente y la atención al cliente?* Obtenido de <https://www.informabtl.com/cuales-son-las-diferencias-entre-el-servicio-al-cliente-y-la-atencion-al-cliente/>

RGUEZ, I. H. (12 de Noviembre de 2015). *villanett*. Obtenido de <http://www.nube.villanett.com/2015/11/12/factura-electronica-en-mexico/>

Rodríguez, C. (7 de Noviembre de 2018). *icrevolution*. Obtenido de <https://www.icrevolution.com/blog/fases-del-proceso-de-atencion-al-cliente/>