



## 2. Operational Reviews/Audits

To understand what, why, how, and IF there is a need to change or improve, an essential starting point is an operational review.

The audit or review is frequently the starting point for operational change from both a strategic and tactical perspective. Operational reviews suit all sorts of organisations, including those:

- Which don't yet have a cohesive customer service strategy but realise the need to focus on this as a key imperative.
- Which need to understand their current customer experience model and service delivery functions and perhaps compare with best practice.
- Which are considering outsourcing but need to review their processes and effectiveness first.
- Which need to rationalise roles, understand performance metrics.
- Which are about to integrate disparate organisations – perhaps following an acquisition – and need to compare, contrast and move forward with one plan.
- Which are outsourcers and need to understand how they are performing and what to do to improve impact and effectiveness with their clients.
- Which need to improve efficiency of operations and generate cost-saving opportunities and/or add value to the customer experience.

Our work frequently focuses on the customer service/contact centre elements of an organisation but as this is but one part of the overall customer experience, our involvement extends into most areas of the business. We assess your current operations, locations, people, competencies, technology, systems, processes, reporting, knowledge management, KPIs, measures, modelling and forecasting, etc, etc – against your strategic direction and intent, benchmarked against the marketplace where appropriate. We then output a set of operational action-driven change initiatives.

Our process can use a set of both quantitative and qualitative methodologies. These methodologies are used to establish weightings and ratings (expectations versus actual performance) of a number of key factors, from a number of different sources (people, information, metrics, performance, etc) from inside and where appropriate outside the business and assess differences and gaps to develop an action plan for change and/or improvement – a performance balanced scorecard.

Below we show some of the areas which can be evaluated – each operational review is tailored to your organisation and your needs.

