

Case Study 1

Situation

UK Mobile telecommunications network facing major changes in customer demands for technical support resulting from increasingly sophisticated, multi-functional devices as opposed to 'speech only'.

Need to recognise different technical support requirements from different customer types against different products and services and spend profiles BUT providing service from multiple units in a disparate and inconsistent fashion.

Action

- Established customer views, opinions and needs by segments including SME (Small and Medium Enterprise), Corporate, Consumer and 3rd Parties – through a series of qualitative and quantitative research methods including customer focus groups.
- Reviewed current operational infrastructure & contact centre performance and assessed internal hierarchy of technical support tiers through multiple business owners.
- Designed a segmentation strategy – providing for different levels of support against product portfolio, spend and size of customer.
- Defined and implemented an 'incubation' or test process for a selected group of the main segments of customers – to trial new methodologies and processes.
- Rationalised points of contact for customers to one central team during the incubation process (6 months).
- Trained (and subsequently line managed) the incubation team in root cause analysis and first time fix processes; equipped the team with various technologies and systems to enable their deliverables.
- Engaged Directorates and functions across the business in the new working methods and recommended changes to organisation.
- Evaluated and recommended incremental self-service capabilities for end customers.
- Implemented a knowledge management system enabler for the incubation/innovation team.

Result

- Significant buy-in from test customer who hitherto had been frustrated at their inability to talk to a knowledgeable technical resource or to a single person responsible for delivering a promise)
- Major improvements in management information and reporting.
- Increased first time fix capability, case logging and case continuity (one contact, one responsibility),
- Reduction in multiple contacts and hand-offs.
- Considerable positive feedback from trial customers regarding the ability of the business to diagnose and solve customers technical issues.
- Improved customer satisfaction index across the segments.
- Considerable 'gelling' of previously disparate teams under one team structure.

Case Study 2

Situation

Major UK Retail Bank embarking on a radical model to design, build, launch and manage a 24 x 7 direct telephone-based bank. Need to deliver all functions, capabilities, people and infrastructure in a period of 39 weeks from decision to proceed through to full launch. Task was to resource a contact centre from scratch and design a complete suite of HR strategies adopting a green fields approach and creating a dramatically new customer-centric culture throughout the business.

Action

- Implemented a differentiated customer services business based entirely around the philosophy of achieving superior quality through the selection (not recruitment) and training of highly customer-focused individuals.
- Created a radically different organisational structure and culture, where each element and function is focused on delivering outstanding customer experiences.
- Design and development of one of the first competency-based selection models in the UK.
- Designed and implemented competency-based telephone interviews complemented by competency related job applications and a whole programme of integrated selection processes including psychometrics. Over 90% of customer facing staff were recruited from the non-banking sector.
- Designed a radical new approach to training allowing staff to handle 70% + of all contacts with banking customers after a six week programme followed by a full accreditation programme involving Managers and Directors.
- Six week training programme designed with three key elements, each of equal importance – products and pricing, systems and processes and customer service and cultural focus.
- Major design of remuneration policies and a redesign of traditional banking benefit packages.
- Manage the front and back office customer contact centre operations.
- Line manage as Director of the business, two major functional teams.
- Design of the first customer focus index.

Benefit

- Build of a fully operational business within all projected timescales.
- Bank recognised as the UK pioneer of direct customer relationships.
- Unparalleled customer satisfaction scores throughout the life of the business.
- Significantly low staff attrition rates.
- Minimal post training programme fall-out rates due to real focus on the significance of selection and structured training.
- Design and implementation of a team to trial new and faster customer acquisition/account opening processes through a range of creative and empowering activities.
- Development of forecasting models to predict future call volumes.
- Development of a sophisticated accreditation process.
- Design, development and delivery of a highly participative continuous improvement/quality programme.
- Major front-line resolution and one-stop contact handling.
- The business still has one of the most admired and aspired to cultures in the UK.
- All levels of management including Directors handle customer escalations.
- A true inverted pyramid organisation structure – where the front-line are the main line!

Case Study 3

Situation

A new start-up in the entertainment business.

Action

- Define service standards.
- Design and write RFP (Request for Proposal) for outsourcing of contact centre.
- Chair the outsource selection board
- Negotiate and manage the contractual relationship with the appointed outsourcer
- Design detailed volumetric forecasting and contact modelling of the service operation
- Assist in the initial design of the billing platform and part of the team which selected the supplier
- Create and implement a 'cultural map' illustrating the role of individuals and teams within the business at large.
- Design and manage the delivery of the service training programmes
- Manage the delivery of initial management information and performance
- Manage the customer service operation on an interim basis.
- Develop the forward strategy regarding future building and sizing of a self-owned customer service facility

Benefit

- Staff selection targets all met.
- Training programme fully 'operationalised' ahead of targets.
- Contact Centre operation launch on time and to budget.
- Major customer acquisition success.
- Systems and processes in place and operating to plan.
- Volumetric forecasting models completed and operating effectively.
- Contact Centre technology operating.

Case Study 4

Situation

Major customer service outsourcer with the need to grow revenues over a five year period by fourfold. Need to evaluate competitive forces and understand their key strengths and weaknesses, review the market opportunities, assess the performance of the business against end client expectations, recommend actionable change plans.

Action

- Design of a quantitative and qualitative performance evaluation process to evaluate end client perspectives of expectations and performance of their outsourcer against 21 key assessment criteria and 200 issues.
- Visited each client and facilitated the gathering of performance and expectation data as well as anecdotal feedback.
- Evaluated/undertook an operational audit of each client operational unit within the outsourcer at high level and used the performance evaluation process within the business to assess internal perspectives.
- Compared client feedback with internal feedback and undertook a gap analysis across the 21 key areas of focus.
- Drew up a recommended change action plan against each client and also at an overall level within the business.
- Reviewed the key outsource players within the customer service marketplace and through this competitive landscape highlighted key players, aspiring competitors and opportune markets.
- Ranked and rated the client outsourcer with the marketplace in terms of revenues, seats and resultant performance ratios.
- Facilitated the introduction of an executive coaching intervention at senior level.
- Outlined strategies for entering new market segments and presenting options for consideration by the Board.
- Helped redefine and manage the bid process and oversee two major RFP responses.
- Co-managed a selection Board process for the appointment of several senior level resources.

Benefit

- New bid management process resulting in several major contract wins.
- Business focused on strategic change and growth.
- Business recruited new experience from the wider market.
- Improved knowledge and awareness of market and future approaches to win business.
- Greater understanding of risks, opportunities and threats from competition.
- Improved communication through feedback to end clients of agreed action plans to address gaps between expectations and actual performance identified.

Case Study 5

Situation

A major Housing Association planned and made some significant changes to the way in which it handled customer contact and decided to rationalise several geographic units into a single operational customer service centre.

Whilst the changes were in large part successful, aspects of the processes needed more attention and in the event the performance of the service centre required some considerable focus.

A major need was identified - to bring about some major change in the end-to-end 'customer experience' with particular regard to the contact centre, its processes and the resultant management information.

Action

- Conducted a high level operational review, from which was identified the need to dramatically improve contact handling performance, to implement change in a controlled fashion and also to provide help in actually achieving a single service centre with multi-skilled staff, handling all aspects of the customer interface.
- Established a structured programme plan embracing several different organisational functions and mapping all the dependencies between them
- Established and managed a Programme/Project Board with the CEO as the main sponsor.
- Designed and delivered an initial 20 day recovery plan – intended to rapidly improve call handling performance, increase the centre opening hours, review the back office administration associated with the contact centre and to do this by a clear focus on people and operational review disciplines.
- Focused on a return to basic operational principles.
- Listened to and actively involved the customer service staff before initiating change (for example, to make more information available so that they understood their role and its importance).
- Changed call routing, placing an emphasis on the telephony solution – VoIP – by ensuring its design and delivery against user requirements rather than IT needs
- Delivered process changes
- Mapped core skill sets and improved training plans.
- Active involvement in helping the business following a major disaster by helping manage offsite resourcing and by providing practical, hands-on advice and involvement in project managing the rebuild of the computer room and the co-ordination of the business recovery.
- Design and management of several of the essential management interfaces and development of granular management information
- Facilitation of the design and mapping of core business processes, many of which changed in a short to medium-term timeframe as a result of a new system initiative;
- Providing interim management – acting in the capacity of Customer Service Manager for the short-term.

Result

- Dramatic reduction in abandoned calls from high double digits to low single figures.
- Considerable improvement in staff motivation and morale.
- Consistent operational management.
- Focus on proper project and programme management disciplines.
- Design and Implementation of granular management information and reporting packs, highlighting a considerably improved understanding of customer behaviours and patterns.
- Improved call routing and handling.
- Identification of skills gaps, competencies and training needs
- Recovery from a disaster with improved business continuity plans.
- A business which is more user –driven than previously.
- Improved resource planning.
- Improved communications and inter-functional working.

Case Study 6

Situation

A UAE (based quad play (mobile and fixed telecom, broadband and TV), wanted to outsource and offshore a large element of its customer care operation to a business partner, as opposed to simply a provider of service. It already outsourced several aspects of its service delivery but due to the geographic origins and language requirements of a large sector of its customer base it needed to expand its offshoring activities within a sound commercial framework.

Action

We were involved in a wide range of work for this client, over a nine month period and embodying partner selection, due diligence and operational audit activities right the way through to detailed volumetric modelling and conducting an Interim role, managing all outsourced partners in Dubai, Egypt and India. Specifically, some of our extensive work included (but was not limited to) the following:

- A review of the RFP (Request for Purchase) submitted to potential partners
- Creation of extended question sets to enable a more effective selection process
- Design and implementation of a full set of partner selection criteria, fully compliant with the project governance process
- Providing additional partners from which the client could compare proposals
- Accompanying the client on all partner visits (India) and part of the review group determining shortlist candidates
- Assistance with the pricing arrangements/proposals and subsequent assistance with commercial negotiations and final procurement
- Provision of technical network requirement recommendations and connectivity into India
- A full operational audit and performance improvement plan (with over 100 recommendations) covering people, process, operational issues, environment, systems, technology, management information, reporting and modelling
- Lead role in managing the shortlisted partners due diligence process on client premises
- Interim Director of Outsourced Partners, covering:
 - Operational audit of Egyptian incumbent partner with 70 action points
 - Production of an integrated prioritised action roadmap, matching outputs/recommendations from the operational audits with the overall customer care plan
 - Production of a revised quality monitoring process
 - Development of volumetric models for outsourcing to each partner
 - Recommendations for a new structure merging real time resource management with work force planning to form a wide-ranging command and control operation
 - Development of a highly flexible, interactive and cross functional and cross-geography balanced scorecard
 - Design of a 200 page partner best practice document/blueprint for use within the customer care operations and also to serve as a template for other functions moving to outsourced partner relationships
- Advising on performance improvement opportunities for the contact centre
- Recommendation of revised training processes and modules
- Design of a new accreditation scheme for telephone-based staff

Result

- Successful appointment of an Indian-based outsourcer within a competitive pricing framework
- On time launch of India partner
- Bringing the existing Egyptian partner back on track using our proven audit and performance improvement criteria
- Significant progress in terms of our change management recommendations across the customer care estate – all countries, all partners working to one agenda and one set of values, KPIs and success criteria.

Case Study 7

Situation

Russia's largest (US\$2bn), Moscow-based Insurance provider (Life, Motor, Health, Accident) sought to consider entry into the direct (contact centre and Internet-based) insurance market – a new channel versus the existing channel utilising over 50,000 'agents' representing the client throughout the country.

Action

Working with an international firm of actuarial and Insurance experts (as lead), a small team of four was established to develop a full five year business plan for the new proposition, whilst at the same time acting in interim capacities. The specific work we carried out within the team covered a total elapsed time of nine months and included the following:

- Interim Customer Service/Operations and IT Director
- Customer focus groups to determine market opportunities (leading to first recommendation to develop a money supermarket product set (insurance and banking) as a clear market demand existed
- A complete review of the existing contact centre operations and evaluation of suitability to embody any new business
- Evaluation of existing IT infrastructure (applications, servers, security, data centre, networking, VoIP contact centre requirements, etc) and recommendation to proceed using specific aspects and developing others specifically for the new business in isolation
- Involvement with the corporate IT function in workshops to determine revised business processes and systems (unrelated to the new 'direct' business proposition.
- Definition of CRM/contact management requirements and processes for the new business
- Professional recommendation for purchase of a new VoIP Telephony solution
- Complete end-to-end design and iteration of a full business model covering investment and ROI/P&L based on a comprehensively designed product portfolio and incremental product penetration over the business plan lifecycle. This model included full volumetric forecasts of each product from a service perspective, headcount requirements and costs (operational and capital).
- An extensive 300+ page report covering the recommendations of the team
- A comprehensive presentation to the Board

Result

- The initial business recommendation was presented and subsequently modified to present an initial downscaling of resource requirements and investment
- The revised business recommendations focused on Insurance as the main products and a revised model reflected this change
- Following the appointment of a new CEO, the business placed the plans on hold but extended our work to focus on the development of the existing contact centre and how this could be extended across other locations within Russia (a huge country with considerable technical infrastructure challenges and disproportionate costs)
- Towards completion of activities to re-focus the contact centre operations, world economic circumstances changed and the project was placed on hold for an indefinite period.