



Client Needs and Objectives

This business – to business contact centre was aiming to improve speed, flexibility and responsiveness to marketing-led fluctuations in workload by introducing multi-skilling and to move to a more customer – focused culture. We were asked to deliver a year-long programme that would:

- Support move to multi-skilling (particularly support staff onto phones)
- Increase the company's syndicated industry rating.
- Increase their financial advisor rating.

➤ What we did

- Activities:
 - Diagnostic / discovery phase across all functional areas and all levels of personnel
 - Design & agree implementation plan
 - Implement in partnership with internal Project and Senior Management Teams
- Implementation details:
 - Redesign of quality standards for measurement and coaching
 - Calls, written communications and case handling
 - Skills and culture change workshops
 - Review and redesign of performance management criteria
 - Individual coaching and management support
 - Alignment of standards across the team
 - Skills transfer:
 - Assisting in the recruitment and development of internal trainers to deliver material going forward
 - Designing follow-up training modules for internal use
 - Regular progress reviews
 - Championing and management of project

➤ The Outcome

Bottom Line Improvements:

- Staff Retention increased from 72% to 92%:
 - Recruitment - saving £90k.
 - Retained competence - saving £864k.
- Productivity increased:
 - 25% in first year and 10% in second year
 - 12 to 16 cases per day - saving £252k
- Staff Satisfaction score increased from 69% to 79%
- Increase in Revenues of £5m+.

Measures of success:

- Syndicated industry rating rose from 8th to 3rd.
- Financial Advisor Rating from 2* to 5*.