



Customer Services Centre (CSC)

Business Diagnostic

September 20XX



Key Headlines – High Level

Development Areas Identified

- Standard ways of working not evident (CSC);
- Ops KPI's can be better aligned to customer experience; (CSC – AHT used as a primary metric for Advisors) No true 1st Contact Resolution metric.
- Team Leaders lack sufficient headroom to actually manage their teams. TL metrics focus on admin & Resourcing tasks, rather than Customer outcome. TL's sit remotely from their teams and don't carry out any call monitoring or coaching
- Limited awareness of productivity & quality performance at team level
- Team performance Quality, Cost (Productivity), Delivery metrics not in place
- Work organisation: Lack of clear delineation between Cap Planning and CSC responsibilities
- Operational communication & visual management Lacking across all areas

What was Delivered

- Standard ways of working developed and deployed within CSC, focused on First Contact Resolution.
- Ops KPI's re-defined and rolled out, with the focus on customer experience and driving the appropriate behaviours.
- Team Leaders 'Structured Day' developed and deployed, along with coaching aligned to this. TL's sit within their team environment and carry out the call monitoring and coaching for their team.
- Quality, Productivity and Delivery metrics developed and put in place for all teams and individuals, aligned to customer outcomes.
- Work organisation: Capacity Planning and Resourcing activity moved back from the Team Leaders, into the Resourcing team.
- Operational communication & visual management developed, designed and implemented across all teams, at all locations within CSC.



Operations Excellence Assessment (OEA) Overview: Customer Services (CSC)

	Basic	Competitive	Leading
Customer & Supplier Awareness			
Capacity, Skills Management & Work Org			
Operational Management & Controls			
TL Role, TL Training & Development			
People Management & Communication			
Process Management & Improvement			
Technology & Workplace Environment			

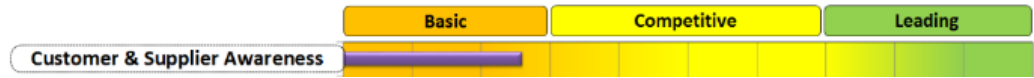
The Assessment is a tool to help understand the strengths and weaknesses of a service operations area; it helps judge whether operations have in place the building blocks for an excellent service operation.

This is a detailed grid representing the full OEA assessment. It consists of multiple columns and rows, each cell containing specific assessment criteria and performance indicators. The grid is color-coded, with green indicating high performance and yellow indicating areas for improvement. The columns correspond to the 'Basic', 'Competitive', and 'Leading' performance levels defined in the overview table.



Detail

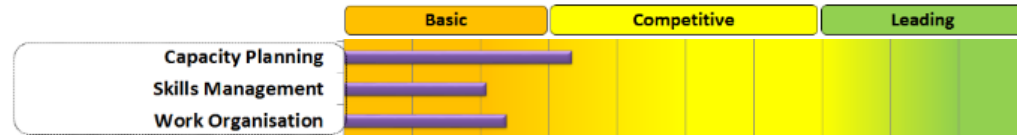




Customer & Supplier Awareness

CSC Issues

- Metrics not in place at individual and team level linked to customer experience or satisfaction
- 1st contact resolution would be a more appropriate customer focussed primary metric than current ones



Skills Management & Work Organisation

CSC Issues

- No vehicle currently exists for tracking and monitoring skill levels of CSC staff
- There is currently nothing in place within CSC to track changes or communications and the effectiveness of these

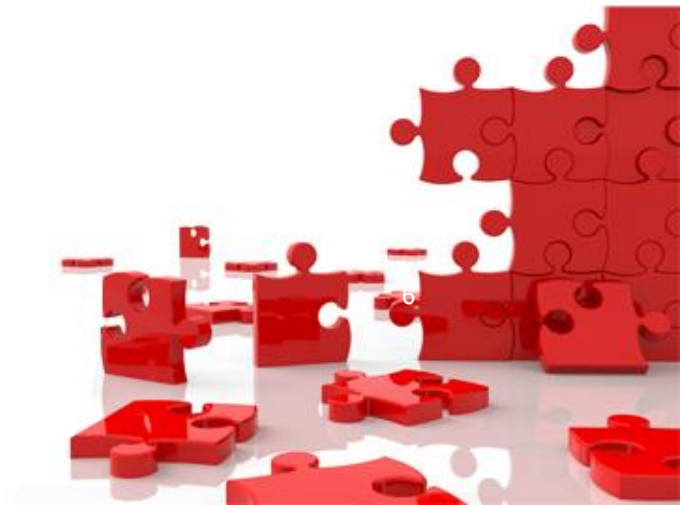




Operational Management & Controls

CSC Issues

- AHT is primary metric, which leads to sub-optimal behaviours and is conflicting with customer experience - Targets are arbitrary, rather than accurate. Performance spread for AHT is large, indicating lack of standardisation across Advisors
- Teams have no targets, only individual targets which are reviewed monthly
- QC checks are carried out bi monthly for competent Advisors, monthly for Competent and Helpline staff and feedback is carried out as a result by Ops Coaches
- Monitoring sheet seen as tick box exercise and ineffective. Killer Questions not related to customer outcomes
- QC process ineffective and Feedback loop too long
- Coaches are currently involved in the PIP process, which should sit with the TL

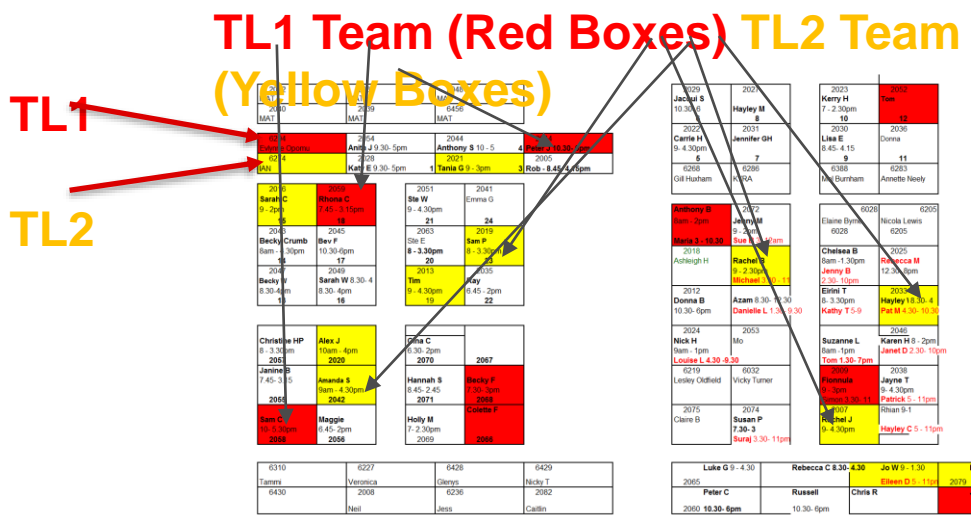


Team Leader Role, Training & Development



CSC Issues

- TL's spend very little time actually managing their team (See fig 1)
- Team Leaders aren't measured or targeted on the 'Performance' of their team
- A structured TL training program doesn't exist currently (TL Driving Licence) to aid TL's make the transition from previous role to TL
- TL's are not on the same shifts as their staff and do not sit with their staff - Core hrs TL's generally have core hours staff but some of these could be on earlies or lates
- Remote TL's feel a little isolated and 'Out of the loop'



People Management & Operational Communication



CSC – Operational Communication Issues

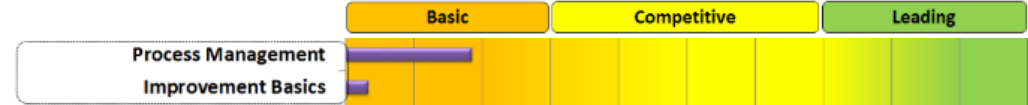
- Communications an issue across Customer Services, where Operational briefs carried out by e-mail with no PDCA (Plan, Do, Check, Act) regarding checking understanding (Approx 7% effective).
- Monthly team meeting is the only F2F communication, no daily or weekly face to face communications, so if advisor on holiday or sick and calls queueing upon return, no time to catch up on e-mailed briefings
- Visual Management not in place at team level. Department level board in place but not referenced by staff (CSC)

CSC – People Management Issues

- AHT driving wrong behaviours in CSC. Individual metrics only feed into ROA - no team metrics for CSC
- TL's do not coach or call listen as this is done by coaching team – 121's based on 3rd party data
- Attrition rates suggest low morale (21% last 12 month period)

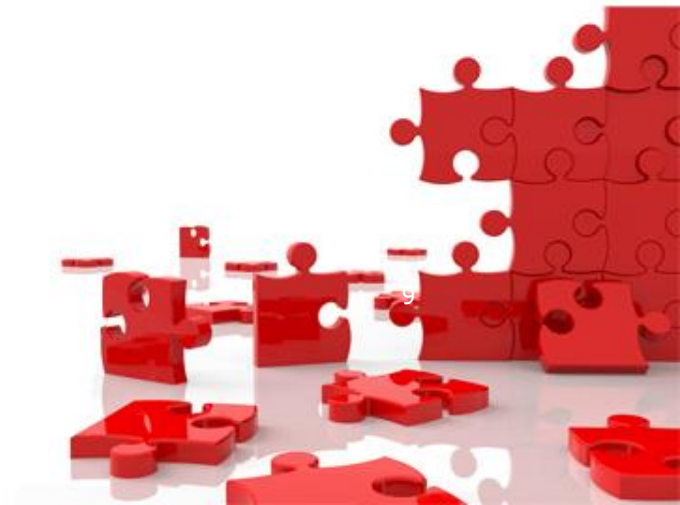
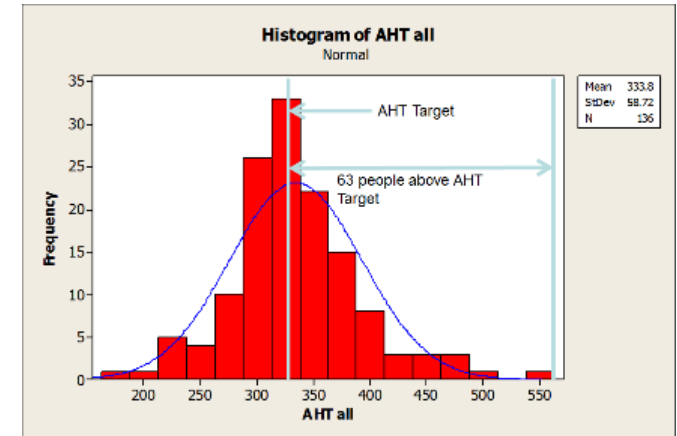


Process Management & Improvement

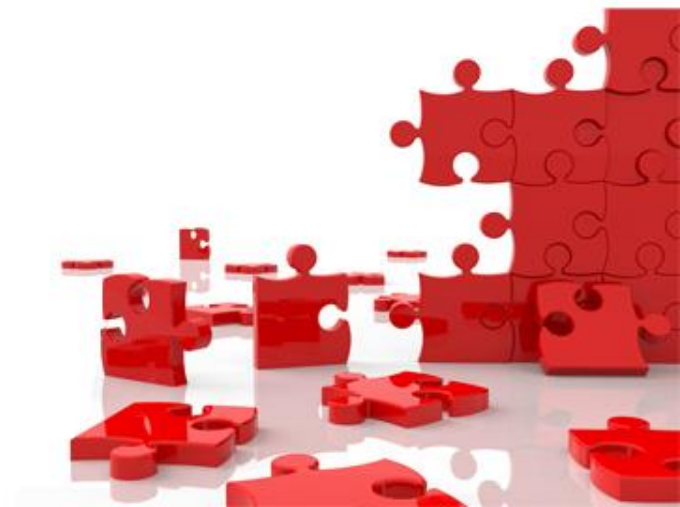


CSC Issues

- Processes on sharepoint for CSC but out of date and some gaps.
- QC checking and monitoring doesn't reflect current processes or Critical Control points
- Lack of standardisation evident in performance 'spread' across CSC
- No structured continuous improvement vehicle currently in place (Operation not mature enough to sustain as basics aren't yet in place)
- New self serve system implemented but advisor hadn't had time to read operational brief and so didn't know how to reply to system generated message. This resulted in e-mail being looped back into system, rather than responding to customer and would probably have resulted in repeat call from customer.



Appendix
Operations Excellence Assessment
Before and After



Operations Excellence Assessments - CSC

March 20XX



August 20XX

