

Customer Experience & Contact Centre Excellence

Your business.
Transformed



Our Approach

- 01 Understand inbound demand, planning, resourcing and performance
- 02 Understand the Voice of the Customer/ Agent and set performance targets
- 03 Optimise customer journeys and agent onboarding/coaching/performance
- 04 Implement performance controls, optimise customer channels and implement churn prevention
- 05 Drive efficiency as the base grows through technology or outsourced solutions



Our Methodology

	Discovery	CX Action plan	Example Deliverable
Operations Review	- FTE/Planning - Demand overview - Performance overview - Queue management - IVR messaging - Call backs / templates	Tailored action plan based on discovery review and RAG	Inbound Contact Review Overall inbound volumes, breakdown by channel/department, average speed to answer, abandon rates, average handling times and transfer rates. Historical view and reporting template
Customer Focus	- Voice of the Agent - Voice of the Customer - Contact drivers - Complaints drivers - Social review - SLA review	Tailored action plan based on discovery review and RAG	Voice of The Customer Insight Breakdown by department of main contact drivers/sub-drivers, breakdown of main complaint drivers, review of social sentiment and management. Including customer panel feedback. Recommendations for contact deflection.
Operational Excellence	- Recruitment - Coaching - Quality monitoring - Customer journeys - CSAT / NPS strategy - Agent level RAG reports	Tailored action plan based on discovery review and RAG	Quality Monitoring Framework Implementation of agent QA monitoring scorecard and methodology covering policy/compliance and customer experience. Engagement programme for Agents and Team Managers.
Continuous Improvement	- Governance - Lifecycle communications - Reactive retention - Proactive retention - Channel review - Technology review	Tailored action plan based on discovery review and RAG	Reactive and Proactive Retention Plan Implementation of loyalty offer matrix and call guides/objection handling for agents (reactive). Review of End of Contract (EOC) and Annual Best Tariff (ABT) comms.

Our Methodology

- Detailed discovery in each section of our methodology results in a RAG status and commentary tailored to your individual business
- From this a prioritised CX action plan is produced and presented to you
- If required, we can then work with you on implementation and ongoing best practice

Discovery	Customer Focus	Each area assigned a RAG and outcome is the CX Action Plan
Area	Topics	Detail
Agents	Voice of the agent forums	Do these exist to understand agent pain points - review output/action plans
	Engagement and attrition	Is this tracked and/or reported? What are the current scores
	Exit reasons/interviews	Do these happen? Whats the insight / fix plans?
	Remuneration	Agent / TM / OM - compare to market
	Agent RAG on engagement	Anecdotal - feedback on engagement (run agents forum face to face)
	What are the career paths	Are these defined for Agents / TMs / Ops Managers
	Incentives	Are agent incentives in place (adhoc)
	Commission	Are structured commission schemes in place (all departments)
	Reward and recognition	Is this formalised / whats the format / frequency
	Individual shadowing/call listening	Day in the life and see/experience it (5 days on contact centre floor)
Customer	Performance RAG	Are the top performers known? Are they used to coach/mentor?
	Voice of the Customer	Is there insight into main contact drivers and sub drivers? Review if available
	Voice of the Customer	How are these tracked, reported and used
	Voice of the Customer	Is this broken down into early life / in life /retention / ooc
	Journeys	Are the main customer journeys documented? How are they updated? Review
	Customer Panels	Are any customer feedback panels in place? Review
	Customer research	Has any research been undertaken into the customer base? Review
	Segmentation	Are any customer segmentation models in place? Review
	Vulnerability	How are vulnerable customers handled (temp and perm vulnerability)
	Vulnerability training	Are agents trained on dealing with vulnerable customers? Review
	Large print formats / other	Are these provided? Are they free of charge? Review
	Channels	What is the contact split by channel? Is this known?
	Compensation	Is there a compensation/goodwill policy and/or matrix
	Complaints Root Cause	Is this known and are fix plans in place
	Billing format and messaging review	Review billing formats, bill run timings and any bill/envelope messaging/calls to action
	Customer Forum	Run customer interviews and/or forums (happy path and unhappy path)
	Customer feedback	Is there a mechanism for capturing and reporting customer feedback
	Payment channels	What payment channels are available / what is the split by take up

Discovery	Operational Excellence	Each area assigned a RAG and outcome is the CX Action Plan
Area	Topics	Detail
Recruitment / Onboarding	Recruitment Policy	Who is used? Platforms? Job boards? LinkedIn? Referrals?
	Job Descriptions	Do these exist for all roles / departments
	Skills and Competence	Review of JDs and skills and competencies listed for all roles/departments
	Onboarding	Is the onboarding journey clearly defined / documented - review
	Grad Bay	Is there a grad bay process? How long? Content? Graduation criteria?
Call Drivers	Buddy systems	Green agent shadow for early life
	Pit stops in agent early life	For agents failing SLAs is there a pit stop/refresher bay in place?
	Policies	Review all policies relating to main call drivers (if these are known)
	Process	Review all processes relating to main call drivers (if these are known)
	Procedure	Review all procedures relating to main call drivers (if these are known)
QA / Coaching	Self serve options	Is self serve available for top call drivers? Features and take up rates?
	Fix plans	Are fix plans in place for top call drivers that can be avoided
	Customer Education	On call advice / targeted marketing "Did you know ..."
	QA Approach	Review of the current approach to QA monitoring
	QA Definition	Needs to cover Policy, CX and compliance - review how each is covered
	Scorecard	Is there a QA/CX scorecard and methodology
	Scorecard Guidance	Is there a defined guide to ensure monitoring is consistent
	QA Team	Who currently does QA? Size of team?
	KPIs	Are there any KPIs around QA monitoring
	Coaching	Is there a feedback loop into TMs/Coaches for performance improvement
	Coaching Rhythm	Is there an operating rhythm for coaching / defined process
	Call calibrations	Do these happen? Frequency? Who attends?
	Reporting	Is reporting available at agent level for TMs to monitor agents
	Data	Who produces the data? How is it delivered to a TM?
	Agent RAG	Are agents given a RAG by key metrics? How are Red agents tracked
	TM as a Coach	Are TMs given training on how to coach?
	Best Practice	Call libraries and green hero agents? (dont re invent the wheel)

Implementation Support

- Customer First culture and CSAT improvement plans
- Agent and Team Manager coaching and development
- Managing implementation of new channels
- Reactive and proactive churn prevention plans
- Quarterly business and Continuous Improvement Boards
- Upsell and sales through service programmes

Expected Benefits



Customer

Customer Satisfaction +85%
Net Promoter Score +
Wait times <60 secs
Complaints <1%
Monthly churn <1.5%



Contact Centre

Abandon rate <5%
Handling time optimised
First call resolution +85%
Quality +80%
Upsell and sales through service



Agents

Monthly Attrition <3%
Engagement scores +85%
Customer First focus
Long tenure
Career paths defined



Thank you and Questions