



People and process – why it matters to your clients

▲ The company and the background

The ability of an organisation to change and adapt to the demands of its key clients is essential in any business.

The problems we identified in this particular company were around the Customer Service teams' capability to process new requests or changes to existing client agreements. The organisation was a Customer Relationship Management service provider, so it was essential for staff to be able to make changes to, or add to existing campaigns. They needed to be able to respond to such requests quickly and efficiently, and it simply was not happening.

The Customer Service Team were pressurised into agreeing the changes in order to keep their clients happy but, inevitably, the requested changes were delayed or not processed properly and clients were becoming more dissatisfied and unhappy with the service they were getting.

Over a period of time there had been severe cuts in staff and resources and the Customer Service function had suffered in the process, particularly in regard to development of skills.

▲ The problem

1. The lack of consistent and effective internal communication between departments within the organisation, together with unclear departmental responsibilities underpinned this problem. If you do not know what is possible how can you tell a client you can deliver?
2. A totally new approach was needed which allowed the customer service team to capture all the relevant information from the clients, and then pass it on to the appropriate departments for their feedback and advice, *before* any decision was made about how and when the requested changes could happen.
3. The staff involved would benefit from bespoke training around influencing and negotiating skills in order to handle their clients' requests appropriately and positively influence them.

▲ The Action

Our approach was to go right back to scratch. The Customer Service Team lacked an understanding of how each department operated. What was needed was an open discussion between all parties concerned in order to pool ideas, and *then* design a new process around practical issues experienced in each of the departments.

- We created steering groups involving key people from each department to open up dialogue between all concerned. The involvement of key staff in the decision making process at each stage meant that, not only did we help them create a workable solution, but everyone also 'owned' the new process. It was important that the team felt a sense of ownership for a new initiative which, ultimately, would make their job easier and make them more effective.
- Internal service level agreements were put in place so that the new process had very strict timing guidelines. There was a much greater understanding of precisely how long it took to consider the new additions and implement new requests, and appreciate the time it took for each department to come back with answers.
- We provided expert training in influencing and negotiation skills, to help them handle clients more effectively and feel far more confident and in control.
- Staff were involved in trialling the new initiative and road testing it so that they could add to it and iron out any glitches before it was fully implemented.

▲ The Outcome

There was a far better understanding of the impact of brand new requests on the company as a whole, and staff were in a far better position to advise their clients of what was practical - and to control the level of service they could expect. This change of approach was much better for clients because their requests could be dealt with efficiently and implemented within a deadline that was actually achievable.

The greater level of understanding and awareness amongst the staff of how the whole business worked created a mutual respect between departments, which in turn added hugely to the overall sense of morale and team spirit.

Staff are now able to implement new requests on time, within budget and to the exact requirements of their clients, the key business benefits of which have been;

- Reduced cost and improved profitability
- Increased customer satisfaction
- Reduced customer complaints and compensation payments
- Improved staff morale and motivation
- Increase in capacity to deliver