



## Investing in your people pays dividends with your clients

### ▲ The company and background

The client was an established outsourced contact centre offering integrated database services, direct mail, campaign handling, fulfilment and email marketing. The company had grown considerably over the years through acquisitions and mergers, but whilst the focus was on growth, two of their biggest clients had cancelled some of their campaigns which created a huge pressure on costs with major repercussions for the company profits.

What followed was a stringent standardisation and cost reduction programme in order to arrest the downturn in performance. This programme achieved its objectives, although had some negative impacts with both clients, due to some adverse effects on service levels, and staff. The company needed to adapt and change for their customers in order to continue to deliver a good service, and an investment in the staff was needed to enable them to deliver the change in performance.

People working under pressure and fire fighting on a daily basis, with very few resources and an undercurrent of resentment, will not necessarily see where the problems lie. It is easier to blame 'the system' or other departments for promises not kept and having disgruntled clients. The Client Services Team and their Director bore the brunt of the criticism but, despite the staff losses, carried on regardless for a period of 18 months - until we were asked to assess the situation.

### ▲ Our approach

The company initially thought that they needed an interim manager to identify and correct any problems, but we felt that this would not help the company long term. If change is essential it has to be a continuous process of improvement and employees have to be involved. Without their commitment no new initiative is sustainable.

We began by carrying out a *3Sixty Service Review*, which involved speaking to key clients, management, teams, operations staff and directors.

Following our assessment we outlined the problem areas and priorities and suggested immediate changes which could be made. These were presented to the MD, the Client Services Director (CSD) and the Director of HR. It was agreed that the new initiatives would be phased in over a specific period of time, with close stakeholder involvement and rigorously trialled prior to full implementation. Progress would be tracked on a weekly basis.

### ▲ The problems

Client Services was the heart of this organisation – the hub from which everything filtered out across the organisation – and it had serious problems.

- Managers lacked some key leadership skills, staff performance was not actively managed and there had been no investment in staff training or development over a long period of time. Three separate teams worked in isolation and in competition with each other, with little cross referencing, sharing of information or skills - and minimal team work. Morale was low.
- The team structure lacked proper alignment and there was confusion over responsibilities. Senior people spent time on admin which could have been delegated, as people were unclear about what they needed to do, or what was expected of them. Team members had developed their own way of handling their work, and frequently created their own processes in order to get the job done.
- Gaps existed in their internal communication between departments. If a client requested changes to their existing campaigns there was no way of processing their requests, other than a to-ing and fro-ing of messages between departments. Accountability for the outcome could be improved, and there was a lack of understanding of both the time and effort it would take to make a change.
- The very nature of customer service demands a sound knowledge of the workings of a business that seeks to keep customers loyal, satisfied, happy and trusting. It is nigh impossible to promise a service if you do not know how that service actually works. The Client Services Team operated without really detailed knowledge or understanding of the other departments, e.g. the mailing house, the contact centre or the pressure and demands on those parts of the business.

- Their greatest strength was their commitment to their customers and their desire to do the right thing. However, this was frequently confused with what was reasonable, and promises were made that could not possibly be delivered.
- The Client Services Team kept promising the customers more than could be delivered - a recipe for disappointment and unhappy customers. Operations felt that Client Services did not appreciate the consequences of making rash promises. This approach created huge resentment on the part of those trying to pick up the pieces when things went wrong.
- The Client Services Director knew there were serious issues, but could not actually see what needed to be done. Under tremendous pressure, and besieged by constant questions from the Board and Clients, he was overwhelmed by the problems the company faced. He needed investment in his people, but was unclear how to approach all of the issues. He also needed immediate help with his own personal development, and this was further complicated by the fact that his current role did not suit his particular skills.

## ▲ The Action

The key to managing radical change in an organisation is to actually involve those who are most affected by that change. So much of our work depends on feedback from the very people we are there to help, and that feedback is vital because whatever you do has to work for them for the long term. Change has to be something people engage with and 'own'.

The idea of new plans and new initiatives can often create discord and wariness in a team so it was important that we engaged them from the beginning and demonstrated that change would be positive and would actually make their working life easier.

1. The first move was to set up regular 1-2-1 meetings between staff and their managers where they could discuss their concerns and feel as though they were listened to. With a much better dialogue between the two parties the staff had a much better understanding of what was expected of them, and the new regular meetings formed the basis of ongoing performance reviews.
2. Managers received coaching on how to conduct a 1-2-1 meeting with team members, facilitate discussions, and how to manage and run them on a regular basis. They also learned how to set performance objectives and identify developmental needs for their staff.
3. Many of the existing roles had to be changed and each person's responsibilities and performance expectations clearly defined. The new roles focused on what was best for both the team and the particular needs of the clients. Many of the staff needed coaching and specific training in order to take on their new roles and expert help was provided for this purpose.
4. We created steering groups of key people from each department who could discuss and make decisions about each new change, in order to create a far more open, more communicative culture. Departments now had a chance to sit down together and begin to understand how each of their areas impacted on the other.
5. Each new initiative was trialled for a set period of time to iron out any issues and make sure that the new approach worked. Progress was tracked at every stage and once the trial was over, the initiatives were handed over to specific people to take responsibility and implement the changes across the organisation.
6. Processes were reviewed, altered and improved and then implemented by the actual staff who used them on a daily basis. This was complimented by a business awareness programme to increase understanding of the end to end business.
7. The CSD received personal coaching around his career and aspirations, and it was agreed that his greatest strength was his client relationship skills. He was moved to a role which allowed him to focus on this area. A new CSD was recruited to take his place and the new initiatives discussed with him and then handed over for him to take forward.

## ▲ The Outcome

The performance of the team improved by around 20% within 3 months. Service levels improved, complaints reduced, and not only were all the existing clients retained but additional revenue opportunities totalling £3/4m came through within 8 months. All of this was achieved without any increase in ongoing costs of the Client Services team.