Best Practice Guide 2020

20 YEAR ANNIVERSARY
The Forum
Raising Standards in Customer Operations

2020 Vision

Crystallising your knowledge

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Raising Standards in Customer Operations

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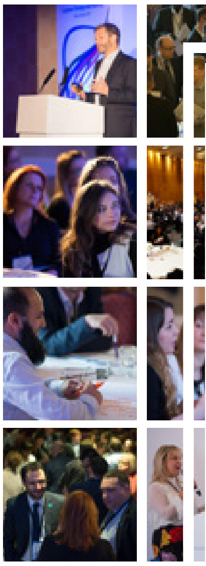
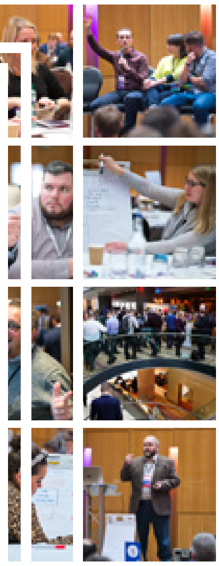
Best Practice Guide 2020

Twenty years of our professional community

The Forum

Raising Standards in Customer Operations





2020 Vision
Crystallising your knowledge

A dynamic community of professionals raises standards, when we share and learn. This shared knowledge has shaped best practice and enables us to face new challenges in the future.

2020 Vision refers to the clarity, focus and sharpness of vision required to purposely move forward towards your targets, goals and dreams. By looking back, we can benefit from knowledge crystallised and shared. This establishes best practice and feeds fluid thinking, to solve problems in novel situations. Now, the best teams play a valued part in our organisations, to deliver strategic objectives, customer experience and colleague wellbeing, using talented analysts to help shape the future. We need to embrace change, automation and new technology – to lift our sights beyond today's tasks and process. Let's develop our skills and future-proof our career.

2020 Vision

Twenty years of our professional community

The Forum
Raising Standards in Customer Operations

2020 Vision: clarity and focus, crystallising your knowledge

Twenty years of raising standards has been made possible by the growth of a vibrant professional community, where we continue to share and learn. From the original vision to now, we look at how this shared knowledge has shaped best practice and look ahead to what the future may bring.

2020 is our 20th year at The Forum, a great time to look back on the first 20 years and think ahead for the next 20. Our vision, back in 2000, was to raise standards in customer operations. This remains unchanged. We have been instrumental in helping to set standards across Planning, Insight and Quality. Now, having established communities of best practice, we will continue to raise standards and prepare for the future. 2020 Vision refers to the clarity, focus and sharpness of vision required to purposely move forward towards your targets, goals and dreams. Moreover, according to work of psychologist Raymond Cattell, **crystallised intelligence** is the ability to use knowledge acquired from past experience, while **fluid intelligence** is the ability to solve problems in unique and novel situations.

Hindsight: a tool for learning?

By looking back, with **hindsight**, we can recognise the benefit of our experimentation and fluid thinking over the past 20 years. We can crystallise our knowledge of best practice and standards now. Then we can look ahead to the challenges and changes we will face over the coming decades.

We've certainly seen both kinds of thinking come to the fore in recent weeks, given the situation raised by the Covid-19 virus. More broadly, looking back, we can see so much great (fluid) pioneering experience transferred into established best practice (crystallised) – and **standards**, especially in planning, are massively higher than before, as Sven Hill observes. Now Head of Planning & Insight at **HM Courts & Tribunals**, he points to "the emergence of a best practice way of doing things" over the 20 years, and "recognition that operations needed to change, to meet the demands of the customer". Will this be just as true in the next 20 years? In what ways? Sven also highlights the beneficial impact of training and networking at The Forum, in crystallising best practice, but also spurring innovation. "How much has Operations saved because of The Forum's influence?" he asks, "I bet it's billions".

Look back over 20 years

Speaking with some of our planning pioneers and awards judges earlier this year, it's clear that much has certainly changed in Planning. For most planning teams, today's issues have moved on from those raised in the first networking groups around the country and the early training workshops at Regent's College in 2000/2001. Workforce management and digital were new, as Benedicte Frew points out from her perspective as Head of Planning & Strategy at **Skipton Building Society**.

For Lorna Stanley, now part of the change team at **BGL**, "the tidal shift is from efficiency being all about costs to focussing more on the customer." And for Laura Moss, Head of Command Centre at **Santander Operations**, the digital era has meant customers have far more knowledge and insight, leading to higher expectations and demands. "The biggest change has been how organisations ... encourage employees to not follow the standard process

2020 Vision: sharing knowledge and best practice

- We speak of 2020 Vision as the focus, clarity and sharpness of vision required to purposely move forward towards your goals and dreams.
- According to the work of the psychologist Raymond Cattell (1963), crystallised intelligence is the ability to use knowledge acquired through past learning or experience, while fluid intelligence is the ability to reason and solve problems in unique and novel situations.
- Eagle-eyed? In visual acuity, 20/20 vision is the clarity and sharpness of vision to see at 20 feet what should be seen, as a norm. The normal vision of an eagle is different. What is needed in our roles?
- In our 20th year, we look back 20 years and look forward 20 also. Do we see clearly, from that perspective and distance, the trends and challenges we need to face as we move ahead?

anymore, but really question what is the right thing to do for the customer". For these organisations – open to challenging old policies and procedures – today is a fantastic time for innovation and transformation, fluid thinking.

Continuing improvement

For Colin Whelan, Head of Workforce Optimisation at **Hoist Finance**, "I personally think the professionalism of the contact centre industry is the biggest change. I remember in the 90's how it was considered draconian, populated by those who couldn't escape!" The shift is remarkable, with contact centre advisors no longer a substitute for face-to-face but, according to research, now the preferred channel for most people. Simon Butler, Head of Planning & Business Intelligence at **esure**, talks about our role as professionals in helping the business "doing more with less". "If we look back on the expectations of us (then only Planning) in 2000 compared to now, the gulf is massive. But I liken it to the Audi A4. Every year Audi re-fresh the model, it's only a small iterative step each time and it always looks like a classic A4, but if you compare 2000 and 2020 models, they look very different."

Look ahead to the future

To remain successful in the future we will need to continue to clarify the ever-changing needs and focus on the right element. Looking at the coming decades, almost everyone we spoke to mentions technology, **automation and AI** – and the speed of adoption of emerging technologies is faster than it has been since the industrial revolution. Some emphasised human/bot collaboration, others innovation in core platforms like workforce management, real time automation, data visualisation or speech analytics. For professionals the value of being an expert user of a system continues to diminish, Simon Butler suggests, as the value

of **business support** consultancy increases exponentially (using our expert skills). We need to change our learning to onboard these new skills, he argues, and better understand the transformations happening in operations. For Laura Moss, the focus on **wellbeing** is key, with things potentially getting worse, before they get better. Yet some changes are here to stay, suggests Lorna Stanley. "I am a firm believer that the **gig economy** will become the norm, so workforces will change significantly". "As we race into the 21st century", Colin Whelan concludes, "the **novelty of choice** is now a staple demand. This is going to be the biggest challenge in my opinion."

Add value as a professional

It's essential to be professional if you want to be successful and taken seriously. Our remarkable community of best practice at The Forum brings together an enormous spectrum of professionals. This is valuable, because we offer a safe place in which to reflect, share and learn. It is when we see ourselves clearly, as professionals or operations, that we can ask better questions, search for better answers and be more **confident and creative** – 2020 Vision. Yes, being self-aware isn't as easy as you'd think, but it sure matters! Alongside this, a professional community crystallises the knowledge that comes from pioneering new approaches and technologies – with standards, guidelines and frameworks. **We are 'in this together'**. Of course, we need to adapt these for our own environments and challenges. It is for us to develop, evolve and join up strategies that transform customer operations – for the people who work in them and the customers who depend on them, as much as the businesses or public services in which they play an increasingly important part.

A safe place to learn

Creating this safe community, which develops best practice and helps people think differently, is at the core of everything we do at The Forum. Twenty years ago, when Paul took the bold step of creating the Professional Planning Forum, he had the vision and belief that bringing people together would raise standards. Looking forward, we need to consider our increasing reliance on data, the impacts of **digital transformation** and how collaborative intelligence (working with machines) enhances our capability. We will focus increasingly on strategic planning, now prominent at the start of the **planning cycle**, and planning for wellbeing, of growing importance. We can expect further innovation to improve customer experience, with planning and insight informing best practice across organisational siloes, end-to-end for the entire customer journey. What won't change is the part we play in our own lives. With clarity, sharpness of vision and a strong purpose, we will always succeed.

Phil Anderson is a Director at The Forum. Contact him at: phil.anderson@theforum.social

2020 Vision: planning teams as the beating heart of a business

The 2020 Team Awards demonstrate how Planning has become central, supporting transformation, influencing change and shaping the business strategy. Look for new ideas and continuous improvement, by learning from the best and seeing approaches used elsewhere.

Twenty years ago, the planning team was seen as just creating forecasts and shift patterns, then watching operational performance real-time. Now, the best teams play a central part in the success of the organisation, supporting delivery of strategic objectives, customer experience and colleague wellbeing. This can be seen in Standards Accreditation, the Innovation Awards, and the dazzling shortlist for our 2020 Planning Team of the Year. Here, we see a mix of industries and variety in the type, size and responsibility of the team. There's something for everyone to learn from, and this year 15-minute online videos make these inspiring stories uniquely accessible to us all.

Beyond the call centre

Digital transformation over the last 20 years has had many impacts, not just growth in digital contact channels, but also using newly available data in field, branch or back office operations. Take the work of **Legal & General** (pg 18) in transforming the back office and the speed with which **Clarks** (pg 36) could catchup on digital transformation. Planning teams need to engage with operations in a way that was unimagined back in 2000. Communicating across the business is vital, putting data and capacity plans at the heart of everyone, not just the contact centre. In the team awards, end-to-end planning at **Yorkshire Ambulance** and **North East Ambulance** is changing the operating model, with financial as well as service benefits. At YAS (pg 22), this has involved changing the type of response vehicle to despatch based on models and analysis, the kind of approach we've seen at a higher level in planning response to COVID-19. At **Severn Trent Water** a new, small team have had a powerful impact on the field operation, bringing analytical thinking and planning into the management of shrinkage.

Shaping strategy

Shaping and influencing is the key in creating a workforce strategy with which to implement an operating model that delivers key objectives. Moving beyond routine checks and governance, this is about engaging key stakeholders as the custodians of truth, proving insightful data with practical interactive models. The team at **Sky** (pg 30) have focussed on the strategic plan to ensure that the operational and planning team are set up to deliver key objectives. Likewise, **LV=** (pg 26) radically simplified 'what-if' modelling to create interactive scenarios for their key stakeholders. Both teams have a purpose aligned to the business strategy, helping everyone understand the part they play. And at **RSA** (pg 28), strategic planning is joining up the business, with the capability to analyse a wide range of budget scenarios at a remarkable speed.

Strong relationships

Establishing effective relationships and networking across the business is another key component of a successful planning team. A core learning module from the original Professional Planning Forum Foundation course remains a staple tool – the Up-Side-Down model referring to how Planners need to engage with all levels of the organisational hierarchy. The success at **Legal & General** and **Three Ireland** has been built on this trust and understanding at all levels. An engaged planning team is able to keep improving and introducing effective change because of the trust they have created.

2020 Vision for the Planning Team

- Plan for the end-to-end customer journey; don't just plan and consider one element
- Understand the business strategy and build a plan that delivers this
- Develop effective relationships in the business and an outside network
- Understand the data journey from long-term plan to on-the-day
- Capture learning and tag data to continually improve

Learn from brilliant 15-minute videos of the finalists at www2.theforum.social/2020TeamFinalists.

Planning Team of the Year 2020: eleven great finalists

Readiness & effectiveness

Operational readiness and effectiveness remain a core role for the Planning team, to translate the operating model and long-term plan into on-the-day practice. Crucial to this role is the understanding of the strategy and original plan to the reality of the day. Understanding which levers to use to maximise performance, customer experience and colleague wellbeing. Both **Virgin Media** and **RSA** have demonstrated how to become the nerve centre of the operation. Crucially, continuous improvement is at the heart of the planning cycle, the ethos of a great planning team. Whether at the start of their journey or a mature planning function, it is critical to look for improvement, innovate and establish best practice principles. **Welsh Water** have demonstrated how to develop individuals to improve understanding of best practice and raise their standards of output. **npower** are continually improving, developing forecasting models and redefining how the team can support both tactical and strategic change.

2020 Vision

Twenty years from now, the role of planning will still be evolving, but I'm certain the best teams will be shaping business and workforce strategy. Some of us will be working in ways we cannot yet imagine. So, I ask every planner, at every level, to lift your vision. Focus clearly on how you add value. Don't stay stuck in task and process but develop your skills and capabilities. Engage across your business, to provide valued insight and shape the end-to-end customer journey. All the best teams have one thing in common, they have become an in-demand team.

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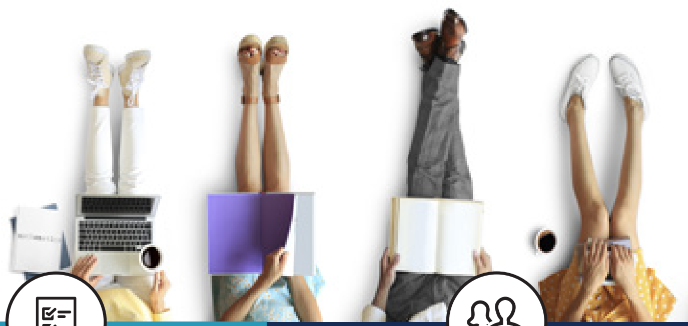
The Forum Learning Academy

Workshops & Assisted Learning Pathways



Group Learning
Work interactively and learn from others

Tailored & Bespoke
Learn specialist skills to power your development

On going Support
Applied learning, mentoring & specialist tutors

Dig Deeper
Specialist modules, 6 months support to apply learning

Gain Accreditation
Professional accreditation and a completion certificate

Best Practice in Planning
Plan impacts including shrinkage, models & forecasting

Capacity Planning, Forecasting & Budgets
Create a culture of data-driven decision making

Scheduling & Wellness: Managing Flexibility
Learn about lifestyle and wellness options

Operational Readiness & Effectiveness
Determine the optimal approach and build an operational playbook

www2.theforum.social/learning

Contact Ali at advice@theforum.social | 0333 123 5960

The Forum Learning Academy

Learning from Best-in-Class

The knowledge we share draws from our constant engagement with the best teams in our profession

Flexible Virtual Learning Modules

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The Learning Academy: invest in yourself and your people

With a major expansion of our learning materials in the last 12 months, see how members are creating personal development pathways for their own needs, as individuals or organisations. Learning is accessible virtually or face-to-face and can lead to professional accreditation

Our bite-sized learning modules, launched in Jan 2019, are now available on-demand, as well as in live online events. Based on the knowledge and experience built up over 20 years, this learning has been refreshed and updated. It's also shaped into longer learning programmes, fit for the challenges of the coming decades.

You can signup for series on a key topic (the 'box set'). You can gain credits for Professional Accreditation. We run bespoke Learning Academies, tailored to the needs of specific teams. Moreover, all learning can now be accessed virtually, not just face-to-face, and students can choose an approach to fit their learning style, budget and travel constraints.

Over 150 modules of learning

Some love our famous interactive workshops. "It was brilliant", explains Justin Whittle at **Sykes Cottages**. "Descriptive Statistics really helped how I look at and communicate forecast data". Some love to tap into online modules. "I like the recorded learning modules so I can re-visit and learn at my own pace", says Fiona Hanlon at **Aegon ATOS**, and "LIVE modules remind me that I am connected to a community of professionals".

Recently, **Covid-19** has spurred take-up for new approaches and we set up nine new modules within three weeks, gaining some of our highest audiences yet, with brilliant virtual networking too. By evolving new materials, we can draw on both a long-established base of knowledge ('crystallised knowledge') and the latest experience among pioneers ('fluid thinking' for new or unexpected challenges).

Takeaway activities & tutorials

Each module has a different focus, with ideas or exercises that students can take away to look at in more detail. You can build your own mix of modules, tap into a series or join a workshop. The new **Assisted Learning Pathways** (ALPs) bring together people, so you can learn from other teams. Tutorials provide touchpoints, to hear what others are doing, raise questions in a safe environment and learn how to apply new techniques.

Andrew Griffiths from **Cooperative Service Centre** loved the recent kickoff workshop in London, "great food for thought", and the ALP offers six months of practical support and mentoring in putting his ideas into practice, always a challenge, with the chance to gain specialist accreditation at the end. Moreover, our June ALPs are running as an **entirely virtual course**, given the virus situation, which opens it up to a wider tranche of members.

A learning opportunity for all

The Academy is a great resource for experienced analysts/managers, with new resources each month, as well as those totally new to planning, like Amy Hill from **Assurant**. Students, like Deborah Nicholson at **Enterprise Rent-A-Car**, find foundation modules reassuring. They confirm what you do already know and help you "reach out to more departments than I currently do" as Deborah says. It's all too easy to get put off by difficulties in the past.

Training gives the confidence to express what we need as planners, in ways that engage our colleagues and gain the response that is required. In-house academies tailor this balance to the specific needs of their team, at organisations like **Student Loans**, **ADT** & **RSA**. At **BT/EE**, for instance, the group setting up the Academy, led by Helen Kemp, saw that key priorities were aligning teams to a common purpose and giving people confidence and empowerment in developing themselves. An onsite workshop can bring together a whole team to share, learn and build consistency. Online modules can develop specialist interests or pace learning differently. What's certain is that everyone can benefit from learning and the Academy makes it uniquely accessible for all.

Paul Smedley, Founder & Chair and Alison Conaghan, Planning Specialist at The Forum. Contact them at:
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2020 Vision for insight, quality and customer experience

Already, we start to see how the most successful organisations will be using data and talented analysts to help shape the future. So, take a look at the learning from these award finalists and be inspired to develop your skills and future-proof your career.

Twenty years ago, Insight and Quality teams were often isolated and unsupported in contact centres, let alone back office, field or branch operations. We were just pushing data at managers, if useful data could even be accessed. Change, from the top, was in large-scale programmes, continuous improvement slow to emerge and disconnected from insight, quality or even resource planning. Reporting, in spreadsheets, was time consuming, with automation only gradually evolving, even in the best teams, and little time for analysis or value-adding insight. Quality Management was too often a tick box exercise, usually tasked with imposing performance standards on people or to manage compliance, as regulators evolved in the 2000s.

Strategic value

Today the picture could not be more different, at least among the best teams. There are some fantastic role models to learn from – well connected, aligned to the wider strategy and rapidly adopting automation, AI and speech or text analytics. Look at the resources online, as well as here in this Best Practice Guide, from the Innovation Awards, the Supplier/Client Awards and in our 2020 Team of the Year Awards. This year, 15-min online videos make these inspiring stories uniquely accessible to us all. Furthermore, we see a mix of industries and variety in the type, size and responsibility of the team. There's something for everyone to learn from.

Are we fit for purpose?

For many teams still, lack of alignment to strategy means their value is not felt by the business. Here the sustained success over 10 years of operational cultures like at **Motability Operations** have much to teach. Coaching and their Trinity Model lie at the heart of an empowerment and customer service strategy. In the same way, at **Legal & General** (pg 38), coaching is linked to a wider wellbeing strategy, lowering anxiety and improving mental health by changing how people feel about their work. Moreover, "colleagues are relishing the time they get with Team Managers", explains Henry Carman, MI & Insights Manager, and the Power BI dashboards are helping people understand trends. In a variety of ways, teams at **LNER** (training for the digital railway, pg 20), **The Very Group** (the Customer Closeness Centre, pg 46), **Clarks** and **AA Ireland** (on chat bots, pg 36 & 34) are demonstrating how to rise to the strategic challenges of digital transformation.

The Insight, Quality & Customer Experience Team Award Finalists

- **Motability –** How coaching helps advisors develop and deliver for customers
- **npower –** How QA drives continuous improvement of processes in the back office
- **William Hill –** How a new five lens approach has transformed training & quality
- **FCA –** Establishing a new operating & learning model in the supervision hub
- **HMRC –** Creating a culture of learning that delivers excellent customer service
- **Motability –** How knowledge management and communication supports customer experience
- **Welsh Water –** Bringing new best practice for insight into this Welsh water company
- **L&G –** How insight drives performance with planning and coaching data
- **OpenReach –** Building AI capability to optimise use of engineer visits
- **npower –** Using customer journey insight to redefine forecasting model

Learn from brilliant 15-minute videos from each of the finalists at www2.theforum.social/2020TeamFinalists.

Ten great finalists in the 2020 Quality & Insight Team of the Year

Driving improvement

At **npower**, in the Planning and Insight Team, leading indicators help predict future trends and impacts, part of a growing trend that reminds us that forecasting is about insight and planning/single analysts have a lot to learn from each other. The Quality Team engaged their offshore, back office partners to put the focus of quality checks on driving improvement in process – is it right for the customer/business, not just is it adhered to? Savings of c£300k far outweigh the cost of the team, and they built up their skill set in ways that 'future proof' their careers as analysts. The Quality Team at **William Hill** have demonstrated their value in the global operation based in the Philippines and Bulgaria. They have a clear service proposition as part of the wider improvement team, working alongside the speech and text analysts.

Data science

Digital transformation and the explosion of data science have evolved in tandem since 2,000, a trend that will escalate over the next 20 years. The Innovation Team worked directly with field engineers to identify pain points in the end-to-end journey and opportunities to remove non-value work at **Openreach** (pg 40). They created algorithms to identify these in the data and reallocate work plans automatically, making it possible to implement at scale very rapidly. There is much to learn from their use of Machine Learning, a supervised classification model like those used in medical imaging. "It constantly self-learns and evolves and improves itself" as David Bruce, Head of Innovation, explains.

Interaction analytics

For many organisations, a first key step is transforming the way MI is produced and disseminated, like at **Welsh Water**, where a single data warehouse can be accessed by automated dashboards tailored to the needs of each user group. This has freed up a strong group of analysts to develop analytics within the company. This move from push to pull, from data to insight, is a key development that is sure to develop further as we look to the future. At **Vitality** (pg 44), the success of speech analytics for QA has engaged colleagues, with care scores raised by 25% and 15% fewer lapses. As Lauren Holmes, one of the Quality Coaches put it, "I thought capturing a claim process with speech analytics would be impossible, but it wasn't."

The Learning Model

This is an opportunity to go back to the fundamentals of how people learn best and redesign our operating models to use the latest technology in ways that support this. At **The Financial Conduct Authority (FCA)**, the learning model was turned on its head, to allow advisors to own their own learning, given the complexity of financial regulations. This was integrated with a new operating model, in enabling strategies for call flow, skills and resource planning. Strategically, this is part of investing in the 'contact centre' as a strategic asset, a far cry from how the contact centre was still seen at the millennium. At **RS Components** (pg 42), sales opportunities doubled in a tough market, by challenging themselves to empower colleagues and actively engage customers. As Louise Kirk, Head of Internal Sales UK comments, "creating a healthy challenge is not friction; people need support and guidance to improve". At **HMRC** local managers proved that contact centres don't need to be micro-managed to deliver, with advisors empowered to 'do the right thing' for customers – moving quality away from a top-down, tick box, stats approach.

2020 Vision

The message is clear for us as individuals. Let's develop our skills and future-proof our career. We need to embrace change, automation and new technology. Why not lift your sights, not stay stuck in task and process? Clarify where you fit into your organisation's strategy and what you do that adds most value. Twenty years from now, the way we work will still be evolving. Already, we can see how the most successful organisations will be using data and talented analysts to help shape the future. Remember, success breeds success and the best professionals will always be in demand.

Paul Smedley, Founder & Chair & Ian Robertson, Insight Specialist at The Forum. Contact them at: paul@theforum.social or ian.robertson@theforum.social

How can we release the value of partners in transforming our business?

Great partnerships have this in common, both teams become increasingly in demand. With technology transformation a key challenge for business leaders, see how these brilliant award finalists brought learning from the outside that deliver on key organisational objectives.

Technology transformation is a key challenge for every customer operation. It was a challenge 20 years ago but today, and looking to the future, types of technology, pace and impact are so different. We see that shaping very different outcomes and experiences. Moreover, the way we evolve and implement change is itself changed. For Laura Moss at the **Santander Group**, one of our Planning Pioneers, our focus needs to be on how we adapt to this and how we prepare for emerging trends, a challenge for us as individual professionals and organisations.

Experience from outside

At The Forum, we see how much professionals add value when they leverage a powerful network outside the organisation, not just within. When you set something up – a planning team, a new system, a new approach – you need to blend maximum knowledge of how it can be used and maximum knowledge of your own business. We see the potential of partnerships in this way, to bring insight and experience from the outside, always up-to-date and connected. We apply this approach at The Forum, when we partner with members. We've seen the importance of this with technology, over the 20 years, with workforce management, then speech analytics and data science. Do we choose suppliers in this way, or think only of the kit or programme they supply?

Embedding change

Embedding a new approach is tough and requires the right resource from the start, all the more when you are looking at AI, robotics, omni-channel and social networking. Increasingly, professionals have worked on both sides of technology projects. Colin Whelan, now at **Hoist Finance** but previously at Aspect, advises to not "chase the newest technology". Instead, understand the threshold at which a system or contact channel moves from being emerging to embedded, in your operation for customers and colleagues. It's easy to be distracted by "new & shiny", in a world of rapidly changing opportunity. Yet, if we start from our organisation's goals, using the **Strategy Pyramid** (pg 52), others can work with us, bringing knowledge outside-in. Then, we see more clearly where we need **fluid thinking** to solve new or unique problems or where the priority is to **crystallise knowledge**, so that best practice is shared and far more consistent.

The partnership awards

Our Partnership Award recognises outstanding supplier and client relationships. In the shortlisting, there were questions. What would be distinctive about our award? How would members learn? In fact, there was no need for apprehension. Response was amazing and it soon became clear that, in our exceptional professional community of learning and sharing, partners wanted these awards to do just that. In this way the awards programme is crystallising best practice, sharing programmes that are often transformative for both client and supplier. Around half were entered by the client side, unusual compared to other partner awards I understand. We are so proud of the passion that is the hallmark of professionals and the desire to collaborate on best practice, the ethos of our professional community.

Technology transformation

For many clients, the choice of partner was a key ingredient of success. "We've caught up rapidly in the digital space", says Ben

2020 Partnership Awards: a pioneering shortlist

- **AA Ireland & Servisbot –** Rapid development of chat bots as an effective insurance sales tool
- **Anglian Water & CACI –** Blending skills & knowledge to drive improvements in forecasting
- **Clarks & Cirrus –** Partners to deliver a new omni-channel customer experience
- **Fexco & Calabrio –** A trusting, mutually beneficial partnership for workforce management
- **Gladstone Brookes & ConnexOne –** Business growth & efficiency with effective contact centre solutions
- **Jet2 & QStory –** Powering performance with agile deployment of real-time automation
- **npower & Arise –** Proving the value of homeworking for customer & colleague satisfaction
- **RSA & Anaplan –** How strategic planning joins up RSA's view of customer operations
- **The Very Group & Webhelp –** Innovation puts customer closeness at the heart of the business
- **Three Ireland & Tech Mahindra –** Creating a global partnership of planning & insight expertise
- **Vitality & Ember –** Powering quality using speech & text analytics, with speed & scale
- **Zoom & Natilik –** How Quality Assurance adds value in a three-way business partnership

Learn from brilliant 15-minute videos from each of the finalists at www2.theforum.social/2020PartnershipFinalists

Newbon-Stead, programme lead at **Clarks Shoes**. With **Cirrus**, they found wider experience to tap into and the use of chatbots proved transformational, but had not been part of their thinking before. At **AA Ireland**, the partnership with **ServisBOT** made it possible to deliver a great customer experience with chatbots at remarkable speed. The **ConnexOne** partnership provided the chance to establish a new operating platform at **Gladstone Brooks**, driving significant business growth and efficiency. And a 3-way collaboration between **Zoom, Natilik** and their client, **Radius**, introduced workforce optimisation & quality management, helping the client adapt to a capability that was entirely new at that stage. For **Vitality Health**, a managed service for speech analytics and quality management from **Ember** brought passion and expertise, yielding results that many have previously found elusive in this area. The right partnership at the right time is key to success.

Partnership in planning

The **Anaplan** partnership with **RSA** and that of **Calabrio** with **Fexco** show how planning teams benefit from close relationships with their technology provider, a mutual relationship in which the benefits of systems are worked out by talented planners and made available for all to see. Blending external skills and knowledge to drive improvements is also important, with the **CACI** partnership a big factor in the broader approach to forecasting at **Anglian Water**. At **Jet2** real time automation from **QStory** was rolled out in weeks, providing the same support environment for the first time, to home-based advisors as on-site. **Arise** work with **npower** in providing homeworking, that not only covers intra-day peaks and other surges, but complements the overall resource, to enable lifestyle-friendly shifts. It shows how outsource partnerships are moving beyond just saving costs or meeting demand (the big challenges back in 2000) with a more deeply integrated planning relationship.

Likewise, **WebHelp** & **The Very Group** (formerly Shop Direct) tightly integrates outsourced, offshore operations into the group strategy and the management of retail peaks is the fruit of planning expertise on both sides. For **Tech Mahindra** the relationship with **Three Ireland** has evolved to take on planning and insight specialists offshore.

2020 Vision

Strong partnerships require a clear focus both on your organisational goals (so that change is truly embedded into how you do business) and the opportunity to learn from outside (so that you can identify quickly what can work best for you), in this era of rapid change. Great partnerships have this in common, both teams become increasingly in demand.

Paul Smedley, Founder & Chair at The Forum. Contact him at: paul@theforum.social

Transformation & Innovation Awards

Our coveted Awards showcase organisations that are leading the way, engaging customers and creating a great place to work. Let these team inspire you and enter yourself in 2021.

These awards give pioneers and innovators the chance to shine, just reward for their hard work. They give us all the chance to learn from them and together we raise standards, to help the best get better every year. For our 20th Anniversary, it is brilliant to see such a large, diverse and inspiring list of finalist case studies. Join virtual site visits in June or go online to see their video presentations and the full-length case studies.

Transformation Awards

The Forum
Raising Standards in Customer Operations

Beyond the contact centre

Transformation in planning

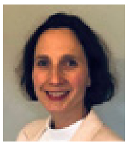
Insight, quality & customer experience

Innovation & Transformation Award Judging Panel 2020

Experienced external judges, together with experts from The Forum, visit finalists on-site, to meet with key players and stakeholders, to individually assess the scope and impact of each nomination.

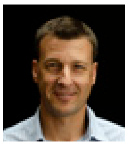
James Brooks, Innovation Principal at Capita. James has 16+ years' contact centre experience, serving in numerous analytical and technology based roles. His current areas of focus lie in emerging and disruptive technology and the application of AI and Machine Learning to enhance customer experience.

David Edwards, Support Services Director at Capita PIP, responsible for Contact Centre Operations, Field & Contact Planning, Performance Management & MI. With 20 years' experience, he has been a finalist and award winner. He was presented a Planning Hero Award in 2017.



Benedicte Frew, Head of Distribution Planning & Strategy at Skipton Building Society. Responsible for strategy, resource planning, improvements, technology and operations support. Benedicte is passionate about growing the planning skills of her team to deliver better customer experience.

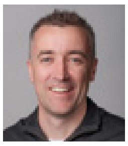
Adrian Hawes, Director at Select Planning. He works with businesses that want to transform their customer service using exceptional resource planning, business intelligence & performance management. A champion for best practice for over 20 years, he's a previous Hero award winner.



Richard Laidlaw, Head of Operational Supports at Sainsbury's Bank & Argos Financial Services. He has over 20 years' experience in leading Contact Centre teams, relationship and change management and leading key support functions across companies such as RBS, Tesco Bank and now Sainsbury's Bank.

Mike Migliore, Shephard Media – Freelance. Senior business strategist with expertise in CRM, digital transformation, AI and product strategy. He has almost a decade of experience in customer marketing. His work has won in several categories at the Direct Marketing Awards.

Laura Moss, Head of Operational Communications at Santander Operations with over 10 years' experience in planning. Laura has responsible for multi-site planning for Contact Centre and Back Office Operations. Laura was a Hero Award Winner in 2019, and has achieved Forum Standards Accreditation 3 years running.



Eoin Power, Director of Planning at BT. Eoin leads the Planning teams across the EE and BT Consumer brands. He has over 20 years' experience in contact centres with the majority of that in Planning, Insight and Technology focussed roles.His EE teams were award winners in 2019.

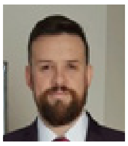
Keith Stapleton, Director at Select Planning. A champion of best practice for 20+ years, he works with businesses to transform customer service. Previous Planning Innovation Award winner with Aviva, he brings exceptional resource planning, business intelligence & performance management skills.

Scott Clifford, Senior Leader Global MI & Insights at Worldpay from FIS, the world's largest payment provider. With over 20 years' experience in contact centres and has worked in Senior Planning and MI roles for the last 15 years. In 2017, his team won Team and Project of the Year at the National Conference.

Lorna Fretwell, Head of Planning for BGL Group Contact Centres, responsible for multi-functional planning reaching across inbound, outbound, web chat and digital innovation/AI. She has over 20 years' experience in contact centres, and won one of our Hero Awards in 2019.

Ian Gibson, Interim Ops Manager at Maximus. Passionate about the need for service excellence, Ian holds an MBA, a six sigma black belt and NLP certified. With 20+ years' experience, he worked previously for companies such as Ingeus, Orbit, npower, Vodafone and Royal Sun Alliance.

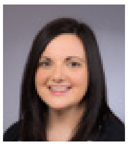
Sven Hill, Head of Workforce Management at HM Courts & Tribunals Service, responsible for the Planning & Insight functions within the newly created Courts & Tribunals Service Centres. With over 20 years' industry experience, he was a Forum Hero Award winner in 2016.



Nathan Milne, Demand Management Lead at the Co-operative Bank. He is responsible for calculating resource requirements and staffing optimisation. With over 18 years' experience of managing analysts for a number of companies. He has managed two analyst of the year winners and one rising star.

Richard Moore, Analytics Leader at Anglian Water. He has 18 years' experience in Analytics, from early career as an excel and access ninja to leading analytics across the enterprise. Richard established an Analytics Community of practice internally with 190 members, winning the Inisght Innovation Award in 2019.

Nick Moule, Resource Optimisation Director at Capita. Nick has over 30 years' planning experience, working with many clients across several sectors. Nick is responsible for the end to end planning for all of Capita's Customer Management Division. This is Nick's third time as judge for The Forum..



Zoe Smy, Lead Planning Manager for BGL Group Contact Centres, responsible for multi-functional planning reaching across inbound, outbound, web chat and digital innovation/AI. She has over 20 years' experience in contact centre planning and holds a BSc in Customer Contact Management.

Specialist Judges

- John Stanwell, Resource Stratgey Manager, SSE PLC
- Allan Bell-Moore, Head of Resource Planning, SSE PLC
- Alec Bowman, WFO/WRM Consultant

The Forum
Raising Standards in Customer Operations

Our Awards Recognise Your Success

Give your team the chance to shine and reward them for their hard work

Transformation & Innovation

Recognition for change in the business and culture with tangible step-change

Teams & Individuals

Recognition for teams and managers, analysts, coaches or rising stars

Supplier Client Partnerships

Recognising the value of partnerships and collaboration in technology, outsourcing or consultancy

A journey of Recognition

Share your story within our Professional Community

JUNE 1
Entries open
Enter your team or transformation to gain recognition for your success

NOV 1
Shortlisting calls
Meet virtualy with practioners and experts to tell them how you have achieved your success

FEB 1
Finalist Judging
Virtual judging makes this quick & easy. Judges only visit on-site for the transformation awards

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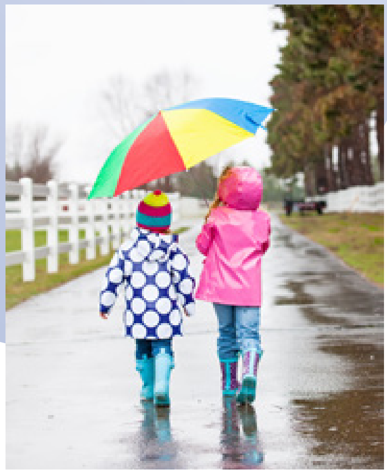
Transforming back office for clients & colleagues

See how planning and transformation teams worked with operations on an operating model that raised productivity 32%, employee satisfaction 13% and halved turn-round times for customers

Summary

See the value that can be gained by visibility, control and engagement in back office operations. Remarkable transformation in Group Protection at L&G has driven growth and profitability on the back of outstanding service, with new corporate clients signing up for this. Brought about by a new model of collaboration, the Transformation, Planning & Operations teams (the 'customer service triangle') have engaged people, using powerful frameworks for change, planning, workflow and communication. Re-launching EG Workforce Manager has been key to establishing control and creating an emotional connection for colleagues. Results are impressive: 21% FTE savings, renewals 75% faster, outstanding premiums cut by 50% and double the consistency of service. The new ways of working are now driving sustained, incremental improvement far beyond the initial recovery.



Key Initiatives

Emotional connection: focus on the why

The need for change in the business and culture was clear – neither customer perception nor commercial performance were where they needed to be, and colleagues were disengaged. Clear sponsorship from the top with strong collaboration and shared objectives across functions enabled closed-loop transformation to embed sustainable change using a human approach. A systemic approach aligned key deliverables – control frameworks, process definition, planning, workflow, and insight. Crucially, establishing a clearer purpose for the area engaged colleagues; focussing on 'why, what and how' drove buy-in to the changes. Emphasis on 'why' established an emotional connection to their purpose as an insurer in offering protection – and helped people really appreciate the value of their work for their customers. "There's a strong theme of collaboration" "Focus on the why" "It's the biggest thing we've done".

Routine: creating certainty in delivering change

A new change delivery framework set engagement and empowerment at its heart. They established a strict 3-month change window, supported by a new communication cycle focussed on last month, this month and next month. It gives everyone time to understand what's coming, when and why, and embeds changes more comfortably. Every change is evaluated by the Transformation Team and fed into the framework with a clearly defined scope. Deliveries pause if the communication cycle has not completed. Subject Matter Experts in Operations support delivery, so that changes work practically for colleagues and customers. Governance enables multiple changes from many sources to be delivered each month (over 100 in 2019) and resulted in an exceptional green rating from Internal Audit. "The hard change window is so important" "There's a clear routine for how we do change now".

The communication cycle that supports change

The new communication cycle was key to success. Drawing on the best elements of various methodologies, the team created a bespoke approach, with

"This transformation is changing the perception of L&G with our key customers and in the marketplace."

Arnaud Carette, Head of Operations, Group Protection

"We looked at our core purpose, why is it important and it wasn't clear; there was no emotional connection for colleagues."

Paul Rogers, Head of Business Transformation

"The new MI has given us visibility that just wasn't there before."

Juliet Jetson, Workflow & Back Office Planning Manager

"We had to re-imagine the way we work with people and help them through the journey."

Gemma Martin, Business Improvement & Readiness Manager

"The 'why' is a huge part of the change process now."

Paul Gendre, Team Manager

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key components such as:

- Engage managers as employees first, then empower them to be advocates of every change to their teams
- Focus fully on explaining 'why' alongside 'what' and 'how'
- Consistent monthly cycle of communications
- Drop-in Q&A and feedback sessions
- Reinforce key messages frequently to breed familiarity with what's coming
- Celebrate success and learning

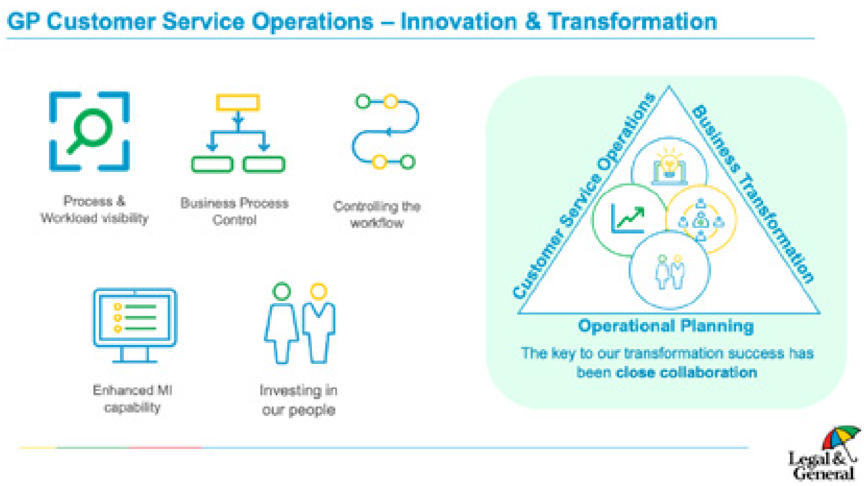
The cycle recognises that Team Managers are vital cogs in the process. Whilst the Transformation Team creates the communications, they are delivered by Operations Managers. As a result, change is landing much more effectively, and benefits come much quicker and stick. "It's a complete cycle that joins everything up" "Colleagues have time to understand what is coming".

Operational & workflow planning

Re-establishing and reinvigorating EG Workforce Manager was crucial. Implementing robust process mapping and governance provided accurate data to support capacity planning. Aligning this to business transformation, the Planning Team 'close the loop' by operationalising all changes. They are reflected in process maps within EG and actual process timings are used in the capacity plan. This means that change benefits can be assessed, supporting benefit realisation and a right-sized operation. The team revamped their governance framework; instigating new meetings and communications to improve the visibility of, and engagement with, the planning process. Key relationships extended into new areas, their success driving confidence and establishing Planning as a shared service across other parts of the Group. "When data comes through, we know it's right" "Everybody knows the plan now".

The operation: data, visibility and control

The governance and support around workflow planning have had very positive impacts on colleagues and managers. From a largely paper based operation, use of EG has digitalised the workflow. All work flows through the system and is fully tracked, freeing up Team Manager time to support their teams. The quality of data enables more meaningful performance conversations and gives colleagues a clearer definition of what they need to do to be successful. Colleagues love the standard processes and visibility of how they are performing against them. Live, self-service reports in PowerBI complement EG data to give managers even greater visibility of pipeline and performance and a new quality framework supports a robust coaching and continuous improvement model. "You can manage in real-time; you know how much work and where it is" "It gives great visibility to the business".



Results

- **21% FTE saving**
- **Turnaround times halved**
- **Employee satisfaction up 13% points**
- **32% productivity increase in 2018**

"We make sure people really engage with what we're trying to do."

Emma Harrison, Business Implementation Manager

"The change communication framework made it come to life. The more times you communicate to people the more they believe it."

Jimmy Turrell, Senior Manager, Group Protection Operations

"There's always something different and there are great relationships across the team. That's why I like coming in every day."

Josh Lock, Customer Service Consultant

"The Customer Services Triangle is the constant piece in everything we are doing. Whenever we make a change, we make sure all parties in the triangle are involved."

Craig Ide, Senior Operational Planning Manager

L&G Group Protection provides business level protection for employees. 300 FTE operate across three business areas (GP Operations, Scheme Underwriting & Claims), four Planning FTE and 10 in Transformation support GP Operations using Anaplan, NICE IEX, Verint EG, Power BI and SQL.

Visit www2.theforum.social/2020LGBackOffice for the full case study and video. We hope you enjoyed this summary

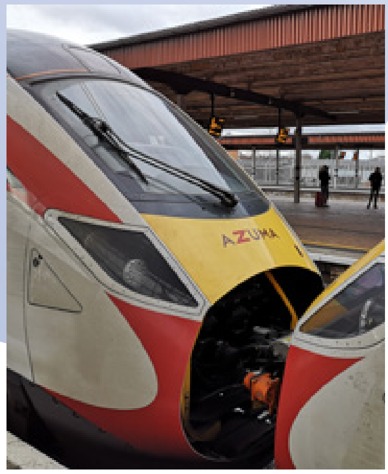
Onboard training from London to Inverness

See how planning helped tackle complex challenges in introducing the first new train type in 30 years, itself the first step in a journey of digital transformation.

Summary

Successful implementation of the new Azuma trains has depended as much on the planning and delivery of training, as the technical introduction of the trains themselves. This required complex planning on such a crowded rail network, including suspending two daily services and gaining flexibility on schedules from colleagues. Yet over 1,600 crew were successfully trained, at the same time that trains were being tested and drivers trained, losing only one service in 18 months. Customer experience is transformed – moving LNER to 3rd out of 28 operators. And technology now provides new facilities and data, paving the way to expand the services further, in a competitive marketplace. Adapting key planning approaches, to face new challenges with limited technology, this is all about engaging with people at the right time to bring them on board on this strategic journey of change.

LNER
LONDON NORTH EASTERN RAILWAY



Key Initiatives

Digital transformation and customer experience

Customer satisfaction has risen 20 points since the Azuma roll out commenced and the new train brings with it the future of the railway. 30 year old rolling stock is being replaced with new technology that enables greater insight to how the trains are used, expected passenger numbers, journeys undertaken and how people use the train's facilities. This insight can now help optimise solutions to passenger demand. Data previously unavailable also now drives better resource utilisation, making their service sustainable and supportive of forthcoming growth plans. Customers benefit from faster and more comfortable train journeys and LNER benefits from providing them in a more cost-efficient manner. "Now 3rd (out of 28) for staff satisfaction" "Azuma enables growth" "It's a crowded market and a busy network" "Counting passengers was a manual task".

Training trains: learning on the move

The Azuma train is completely different to those it replaces, in scale and facilities, so it was essential to provide crew with a realistic experience. What's more, colleagues being trained were also testing the new trains; course completion confirmed that trains were functioning correctly. On-train training made it real, but it was a radical break from the classroom-based approach of the past and scheduling this raised many new challenges. Two regular services were suspended whilst the new Azumas were run for 5,000 miles at 125mph as 'training classrooms'. In excess of 300 runs took place over 18 months, preparing colleagues in 11 different roles, 1,600+ crew and station colleagues. In some services family members were invited and served. Colleague feedback was overwhelmingly positive, stating the training enabled them to work on and with the new Azuma with confidence. "Who doesn't like something new" "Critical to Azuma rollout".

"We needed to change the way we work at LNER. We're bringing the railway into the digital world."

Chris Wilkinson
CX Strategic Resource Manager

"We got staff & union buy-in before changes started. We created trainers within the workforce."

Aled Gardner,
Regional Resource Manager (North)

"Refresher courses were needed due to delays in the Azuma rollout out of LNER's control."

Jemma Webster,
RRPM

"Using the iPhone to communicate with the team, using QR codes and video has sped up communication."

Kevin Keighley,
RRPMr

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Key challenges: keeping the service running

This approach brought new and complex challenges. It's not easy to ensure people and trains are planned together on the UK's busy rail network. No additional train movements were possible, so people had to fit around the trains, even when availability often changed. Services run from London to Inverness through four regions, with planners in each region co-ordinating their training plans, so that colleagues were in the right place to be trained on appropriate trains. Planning had to take account of location and travel time, to comply with worktime policies and ensure colleagues started and ended their shift at the same station. What's more, during the roll-out of the new trains, normal services had to continue and crews were deployed differently. This was all achieved whilst minimising the impact to all colleagues, without the ability to further change the train timetables. "Hitachi own the trains not LNER" "Four regions but only two trains" "This was a massive challenge".

Collaboration: before and during change

Colleagues needed to be exceptionally flexible in their working hours and location, so collaboration was central to the implementation. Trade Union support was obtained through sharing plans and incorporating their recommendations. Colleagues were concerned how the changes would affect them, so online forums were set up to share information including videos of the new trains, the outcome being a clear picture of what was to come. All training was conducted by carefully selected colleagues (super-users), who were known and trusted. To stop myths and misconceptions from early attendees, every colleague was given an iphone, to access on-demand videos, see information as passengers would experience it and communicate with each other. "This was about people not managers" "It's a massive collaboration project".

Planning: do more with no more

When presented with the new roll out plans the challenge of implementing the training plan was three-fold: changes to the normal services and staffing; lack of previous experience; speed and quality of completion. Resource planning has been based on rosters created 30 years ago since the previous train roll out of this scale. Colleague understanding and manual scheduling processes enabled the Resource Planning Team to use their knowledge to allocate training and cover shifts effectively, using Excel. The shifts were input to the roster tool to check they complied to worktime policy and to share them with colleagues. The additional work has been absorbed within the Planning team through collaborative working and prioritisation of existing tasks. "Get the training done quickly and well" "Understand people when allocating training shifts".

"Understanding people is important when allocating shifts ... they know they are valued."

Sarah Runacres,
RRPM

"Everyone learns in different ways. Staff trusted us. They knew who we were."

Darren Shawcroft,
Azuma Trainer

"We're proud to have achieved what we have. We had to get the training done quickly and well."

Angela Owen,
RRPM

"We believe this is an implementation standard ... engagement to meet challenges that build resilience."

Claire Ansley,
CX Director

Results

- **1,600 train crew trained in 11 different roles**
- **92% colleagues suggested Azuma training**
- **Training completed in 18 months**
- **20 point increase in customer satisfaction**
- **3rd most popular train company, 6th out of 28**

"It is impossible to make a classroom feel like a train."

Julia Warrilow,
Azuma Trainer

"Changing for the better. We understand the impact to our customers."

Ken Begol,
Head of Onboard South

"It's important to feel how a train moves. On-train training allows the touch and feel that classroom training could not."

Kat Rowley,
Azuma Trainer

"The UK rail network is the busiest in the world, with 22 hour daily operational hours."

Chris Wilkinson
CX Strategic Resource Manager

LNER history traces back to 1920 taking over running services on the East Coast in June 2018 between London and Inverness with expansion planned for 2021. Service is planned over four UK regions and 53 stations. Systems used includes Excel and Crew Plan roster tool.

Visit www2.theforum.social/2020LNER for the full case study and video. We hope you enjoyed this summary

Confidence in planning transforms the operation

See how core planning principles have transformed the ambulance emergency service across Yorkshire, with great collaboration and leadership the key to gaining trust and making change possible.

Summary

The Ambulance Response Programme (ARP) has transformed patient response times through changes in resource utilisation for the 999 service. With the transformation team, Resource Planning stepped up to provide confidence in decisions, through implementing a planning cycle with patient care at the heart. 130 FTE efficiency was created by developing demand-led, end-to-end planning. The overtime strategy saved in excess of £2 million and all seven performance targets are now being met. Career development, important to colleagues, retains skills in a sector with key shortages. Furthermore, hearts and minds have been changed through accuracy of forecasts and engagement. Doors have opened up to further change. Planning is fully integrated within the Leadership Team and called on by other ambulance services for their own transformation programmes.

"Now we have world class planning. We can forecast resource hours and SLA with confidence over winter. We've made changes to rosters and vehicles."

Stephen Segsby,
Deputy Director of Ops

"This is the best collaboration I've experienced ... and I have 15 years background in planning. This planning team is the best I've worked with."

Michelle Gough,
Head of Capacity Planning & Scheduling

"Annual leave is now based on allocation, not just flat FTE."

Joanne Prieditis,
Scheduling Manager

"Tracking our resource kickstarted the desire for resource planning."

Jon Oldroyd,
Forecasting & Capacity Planning Manager

Key Initiatives

Ambulance Response Programme: transforming how care is delivered

Patient care is measured in time to respond and the use of rapid response vehicles enabled national targets to be met. However, it tied up resource if an ambulance is also required, with two vehicles attending a significant number of call outs. Analysing data suggested deploying more ambulances and the ratio of ambulances to cars was doubled to 7:1. Alongside investment in additional ambulances, changes to rosters ensured two crew members were available instead of one. Furthermore, understanding true patient demand through seasonal and geographical forecasting allows better resource allocation across the county and challenges now being made to how crew flexibility is provided mean that traditional practices are changing. All seven national targets are now met rather than two previously with 1.09 vehicles per call out (not 1.2). "We tied up too much resource".

Critical to success: creating a world class planning team

Commissioners relied on 3rd party resource and geographical forecasts to meet patient demand. The Operational Transformation program established a central planning team for this purpose. A staff tracker was created, building confidence in understanding current staffing which paved the way to using self-built capacity plans to forecast patient demand and resources to meet it. Data underpins seasonality, resource availability and scenario capability within the forecasts. Commissioners can understand how resources are utilised, giving them confidence to use the internal forecasts. New techniques required new skills, planners had their skills reviewed and development plans created. The team is now a trusted partner of the Operation. "Evidence based approach" "Commissioner confidence" "A consistent service, irrespective of demand".

Protecting vital skills through a career development framework

When compared to the likely ability of Universities to train clinical practitioners, capacity plans highlighted the potential challenge in recruitment in a difficult marketplace. At the same time, colleague surveys consistently highlighted lack of development as a cause of dissatisfaction. This lead YAS to establish a clinical career development framework to provide the additional 250 practitioners

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required over the next five years. Colleagues are encouraged to progress up the levels of clinical knowledge and recruitment at lower levels is achievable. University accreditation enables YAS to benefit from the apprenticeship levy, whilst colleagues receive recognised qualifications. Retention is expected to rise as courses typically take 5-7 years to complete. Plans to roll out similar frameworks to non-clinical roles are progressing. “We can train people before we need them” “We have a 5-year workforce plan, not many other Trusts can say that”.

Protecting colleague welfare – a key part of our culture

Mental health is the main welfare concern and the Trust lost the most resource hours to it last year. Yet colleague support is impractical due to work levels and a younger workforce can’t rely on life experience to support themselves. Furthermore, existing welfare processes felt like tick box exercises with colleagues not wanting to admit they struggle. To address this, Planning qualified the scale of the situation whilst unions, managers and welfare experts worked with colleagues to create a framework that works. Providing welfare training now enables colleagues to support each other in a safe environment, whilst understanding when specialist support is needed. Learning is incorporated into capacity plans and roster designs, as the benefits clearly outweigh the impact of absence. “People are encouraged to show their feelings” “In a week, colleagues see an average person’s lifetime’s worth of difficult situations”.

Driving demand-led planning through insight and knowledge

Crucially, historic data and insight is now being used to predict where each type of call out may occur. This proved remarkably predictable and the accuracy of forecasts for patient demand and resource has greatly improved, which has given the Planning team a seat at regular decision making meetings and led to new requests. For instance, providing insight for the emergency cover for The Tour de Yorkshire was pivotal to its success. Challenging the drivers of patient demand has identified how 999 and 111 can work more collaboratively, to improve patient and colleague outcomes, reducing internal handovers and improving first contact resolution in both contact centres. Capacity incorporate resource unavailability and create the requirement to track abstractions and other non-productive activities. As a result, the planned use of overtime has saved in excess of £2million in three years. “YAS wanted proper planning” “Forecast accuracy is key to buy-in”.

“Operations own the challenge and planning define it with the solutions. We are building relationships based on honesty with Trade Unions. Give and take is important with staff.”

Stephen Segsby,
Deputy Director of Ops

“Welfare improvement is not finite, it never ends.”

Ruth Kirby,
Process Improvement Manager

“We apply the same principles as call centre planning, make adjustments and they work in a field operation.”

Michelle Gough,
Head of Capacity Planning & Scheduling

“There’s been a huge shift in openness. Staff thought the Trust didn’t care, but we all do.”

Steve Krebs,
Union Rep & Paramedic

Results

- **Resource per incident cut from 1.20 to 1.08 in 18 months, saving 100 FTE**
- **Hitting all 7 national performance targets (previously 2)**
- **92% schedule fit – up 2% saving 30 FTE of effort**
- **£2m+ saved in overtime payments**
- **Increased 75% staff survey response rate**
- **All colleagues feel their role makes a difference to patients**

“The bigger the challenge the more people need to be involved to meet it.”

Gavin Austin,
Senior Programme Lead – Integrated Workforce

“The academy makes the seemingly impossible recruitment position, possible.”

Wendy Kalvin,
Head of YAS Academy

“We invest time to understand what works for the staff at each location.”

Sam Ferdinand,
Scheduling Coordinator

Yorkshire Ambulance Trust provides emergency ambulance cover for 5m residents and 1m tourists over 5,000 square miles. 2,000 frontline staff operate out of local stations with headquarters located in Wakefield. Systems used include GRS roster tool, Excel and self-built prediction tools.

Visit www2.theforum.social/2020YorkshireAmbulance for the full case study and video. We hope you enjoyed this summary

Planning: keeping ahead of the change curve in travel

See how the customer contact operation at Jet2 has been transformed, to sustain growth and be increasingly agile in a challenging market, with homeworking, real time automation and digital channels.

Jet2holidays
Package holidays you can trust

Summary

Transformation over the past 18 months has been rapid, powered by planning, resource strategy and technology. This is made possible by a culture that embeds change, to drive benefits and become increasingly agile. Homeworking is highly developed and fast-growing, with UK-wide recruitment and a robust virtual support network. Real Time automation (ARTI) from QStory is freeing up time for analysis and supporting homeworkers. Digital development plans include chatbots, asynchronous and in-app messaging. There's been a hugely positive impact on colleagues and customers, with annualised attrition down to just 18% and adherence up to 82%, both in sales. What's more, Jet2.com and Jet2holidays were the only travel sector businesses to feature in the Top 25 of the UK Customer Satisfaction Index.

Key Initiatives

Taking homeworking from good to great

With major changes in the UK travel sector contributing to rapid growth in Jet2's customer numbers, it was vital for the contact centre to keep pace. CEO Steve Heapy appointed an experienced operational management team, who quickly identified areas for improvement, including the firm's existing homeworking strategy. In June 2018, 28% of all staff worked from home in locations close to Jet2's Leeds and Manchester offices, having previously been trained on site. Now, 86% of the sales team works from home, with around 345 homeworkers nationally. To achieve this:

- Social media campaigns attract high-calibre candidates UK-wide.
- Digital recruitment used HireVue video software for online assessment.
- Induction and grad bay are virtual, blended programmes, the latter timed to match new starters' shift patterns.

Attrition has halved, because Jet2 is recruiting the right people, with a wide recruitment pool not tied to specific locations or lifestyle. New starter conversion rates now average 40% in weeks 1-4 versus 35% historically. Crucially, the move has galvanised pre-existing teams, encouraging their own transition to homeworking. "We've optimised our candidate pool" "We've much greater flexibility" "86% of the sales team now works from home" "More frontline brand ambassadors nationwide".

"We've become a thought leader in this area. You know you have the model right when you see that level of engagement"

Sean Ablett,
Contact Centre Director

"Homeworking gives us continuity of service. We didn't experience call queues during the recent storms because the majority of our staff weren't caught up getting into work; they were logged on and ready to go."

Louise Smith, General Manager, Contact Centre Planning & MI

"We needed a blended way of learning that would give new starters flexibility in the way they learned. We wanted to give them access to knowledge and best practice sharing too."

Sean Cooper,
Training Manager

Virtual Support: a robust platform and strategy

Collaborative platforms have been integral to Jet2's homeworking success, with Microsoft Teams and SharePoint used to support new starters and host digital training. These tools have also been deployed to create virtual communities for established teams, including mainline, group and pre-travel sales. Individuals can chat with each other and their manager via instant messaging, group chat & video conferencing. Furthermore, a 'knowledge hub' has been developed, again using Teams and SharePoint, to connect the various communities, publicise promotions and incentives, and build engagement through fun features like weekly virtual bingo. Crucially, this hub also provides access to a new e-learning portal, including 91 visual learning resources, covering topics from compliance to soft skills. "We've worked hard to create a virtual team atmosphere" "No one feels isolated" "It's been transformational".

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Best Practice Guide © Professional Forums Ltd 2020

Driving success through real time automation

With virtual working now embedded, Louise Smith, Contact Centre Planning & MI GM, made the case for automation software and selected the ARTI suite from QStory. This gives homeworkers the same level of real time management and support as onsite-teams, while freeing the real-time team to focus on analysis over admin. She and the team engaged Jet2's operational leaders and frontline, by developing e-learning modules and running a comprehensive team leader training programme. Buy-in was also increased through targeted communications, with mailers showing how ARTI's self-serve app could help people overcome common frustrations. Key functionality includes automated approval of shift moves and swaps, management of breaks/offline activities and a powerful MI suite that is used interactively in team huddles to create understanding of key performance drivers. They also developed functionality with QStory to help manage their outbound calls on the day. Implemented in just four weeks, the platform faced its first major test a fortnight on, when Thomas Cook went into administration. ARTI's Broadcast function was used extensively at this time to communicate contingency plans and offer/arrange overtime, giving an immediate boost to adherence. This has now stabilised at c.82% in mainline sales, 16 percentage points above the pre-QStory baseline. "There's visibility for all" "It's changed mindsets" "People have bought in".

Digital channels: next generation customer service

Another key element in Jet2's transformation has been the deployment of new customer communication tools, designed to consolidate Jet2's high CSAT ratings. Over the past six months, the centre's multiskilled technology team has expanded live chat to cover trade agent and 'manage my booking' enquiries as well as general sales, looking to develop a chatbot, inhouse, during 2020. Furthermore, the team is pioneering asynchronous messaging, starting with Apple iMessage, which was piloted during a four-week agile sprint. With the trial delivering 90% CSAT, metrics from the pilot are currently being built into a future resource plan. Once deployed, the team will introduce other messaging platforms including WhatsApp and rich communication services (RCS). They are also building their own platform for in-app messaging. "We'll apply a controlled pilot across 2020" "Messaging resonates with younger demographics" "It's the future".

"I was hesitant to start homeworking. In 20 years of work, I'd always been office-based. I thought it would be a lonely environment, but I can't tell you how amazing it's been. It's brought huge positives to me, my family and my team."

Hayley Lock,
Group Team Leader

"With QStory you have the option to change your breaks and see how you're doing in terms of your time-keeping. It gives you more freedom."

Samiratou Soffo,
Pre-Travel Sales Agent

"QStory stops us making bad decisions, which can have a negative impact on availability. We can see straight away what the options are if someone needs to be off for a doctor's appointment."

Mark Stevenson,
Team Leader

"We're trying to make things simpler and easier, and help customers to contact us 24/7 at a time that suits them. We were the first travel brand in the world to go live with Apple's iMessage chat service."

Ancel Gornall, General Manager, Customer Excellence and Transformation

Results

- **Homeworking up c.58% year-on-year**
- **86% of sales team working from home**
- **Mainline sales adherence up 16% points, to c.82%**
- **Sales team annualised attrition down to 17.8%**
- **Retail conversions up 28% on benchmark**
- **UKCSI top 25 for Jet2.com and Jet2holidays**
- **CSAT ratings of 82.6 and 82 respectively**

"I believe that our current sales team is more engaged with each other than they'd ever be within four walls of a building. I've never seen that level of engagement, peer to peer."

Sean Ablett,
Contact Centre Director

"QStory enables an opportunity for the real-time team to become analysts, not administrators."

Lauren Lockwood,
Real Time Manager

"Our aspiration now is to become the number one nationwide homeworking employer of choice by 2022."

Louise Smith, General Manager, Contact Centre Planning & MI

Jet2.com is the UK's 3rd largest scheduled airline, **Jet2 Holidays** the 2nd largest tour operator. A c.600FTE multi-site contact centre rises to c.700FTE during the peak. This employs 322 homeworkers and uses Microsoft Teams and SharePoint for collaboration alongside QStory for real time automation.

Visit www2.theforum.social/2020Jet2Holidays for the full case study and video. We hope you enjoyed this summary

Planning transformation and systems thinking

See how Planning gained a seat at the top Customer & Ops table and built confidence in the plan, while at the same time genuinely supporting those accountable for 'doing the right thing' in their own area.

Summary

Systems Thinking is often seen as incompatible with planning, yet the Planning Team at LV= embraced the opportunity to redefine their purpose, gaining a mandate to pioneer new activity and support people using data to make decisions. They are empowering advisors and providing bespoke support to business leaders. Planning models have been stripped back and simplified, data reports automated and made visible. Self-serve for lifestyle planning has cut escalations to Planning by 80% and helped people feel 'set free'. A sector-first tool for surges in demand in home claims is planning what's 'waiting to happen', before it happens, in stormy times! The shift in thinking has helped raise colleague engagement 12% across the business – and support the key goal of exceptional customer experiences, with NPS up seven points to +72.

Key Initiatives

Systems Thinking: purpose, measures & method

Systems Thinking has had a major influence on the culture and leadership at LV=, since CEO Steve Treloar joined the business from Aviva in 2016/17, and it has transformed the way Planning works within the business. In early 2018 a team of systems thinking consultants was set up in LV=, that began undertaking reviews in each business unit. Planning embraced this early, redefining their purpose, with a new structure that gave them a 'seat at the top table'. At the same time there was unprecedented change in the business, with their purchase by Allianz and integration of the L&G GI book, on top of a challenging insurance market. Like other units, Planning re-examined their processes through a critical lens to quantify waste ('time stealers') and identify opportunities for improvement ('value'). Crucially, their new mandate builds on capabilities developed over years in this already award-winning team. They are half the size they were three years ago and delivering far more. "We made it simple" "Remove unnecessary processes" "So much didn't link back to our purpose" "It was an epiphany" "We guide, but business units have accountability".

Data-led decisions in planning and operations

A fundamental strand of this transformation is around data, and the way planning and operations work together with data to drive change. Systems Thinking has transformed how people engage with data and the mindset around targets, removing these at the frontline and evolving measures.

- So, control charts and business dashboards have been designed to call out variances and identify the process or systemic issues that need addressing.
- This builds on exsisting work in SharePoint to automate data and self-service, which started with the team's recruitment of a dedicated data analyst.
- Today, support comes from the central business intelligence team, with an analyst on Power BI. Data science is kicking off predictive analytics.
- Planning models have been stripped back and rebuilt. Now, they are bespoke for each business area, aligned to their purpose. Brilliantly simple 'what-if' models are used in meetings with leaders to shape decisions interactively.

"Measure what matters" "Great conversations" "We're trusted partners" "Engaged directors will challenge well".

"We've thought about what materially is going to impact our business. If it isn't material, why do it? We really do put our people first."

Phil Coole,
Senior Planning Manager

"People love the fact that they feel in control. Planning addresses what matters really quickly."

Nicola Dunning,
Customer & Operations Director

"We're so much more data-driven, making decisions based on the numbers."

Matt Kirkby,
Lead Operational Analyst

"We take people through normative learning. People had to see it in their own eyes – including the exec."

Carmen Harvey,
Systems Thinking Lead Consultant

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Lifestyle planning: choice, certainty & control

An exceptional people culture has been sustained at LV= for many years, a fact appreciated by the new owners. Yet resourcing has been carefully controlled and a desire to 'do the right thing' has led to many exception requests by email. A Systems Thinking lens helped Planning identify the blockers and key changes during 2019 have been transformative for front line teams, who now feel in control, able to make new choices.

- This was enabled by simple, brilliant 'self-serve' systems, including bespoke development on the workforce management system, to make it more automated and easier to use for this purpose. This means CRs can make direct changes on shift swaps, slides, overtime and holiday bookings — and see instant confirmation. Automated time banking has also been established.
- A change in mindset has also been key to success, giving information to people so that they can 'do the right thing' for themselves, a Systems Thinking principle.
- Alongside this, new work on lifestyle shift options is gaining success in migrating from certain legacy patterns and opening up options to attract new recruits. Furthermore, the well-established 300 FTE homeworker operation at LV= is now taking direct recruits for the first time.

"Time steals for team leaders were over things like holidays and shift slides" "It's an ownership change" "We've removed the controls" "It was liberating".

Surge planning in home claims

The team brings pioneering expertise to all business units. For instance, the new, connected planning system, CATsim, is a sector first. Developed with Guy Carpenter and their re-assurer, this is transforming how Claims respond to major storm incidents. The tool uses projections from forecasting agency EuroTempest, overlaid on a map of UK home insurance customers to predict surges in claim volumes for any period. This data is used to gauge impacts and evaluate resourcing strategies. This is facilitated through the cross-functional CAIR team, who review outputs and decide what surge contingencies to invoke. They identify breaking points, so that contingencies can be optimised in advance, for instance by using people from other areas ('stormtroopers') or outsourced overflow – for both first contact and claims resolution. "Data drives the decisions" "You see what's waiting to happen before it happens" "It's agile" "We can quickly model multiple scenarios".

"When you go for culture change it means you have to look at data differently. It's harder. You need to re-learn things you thought you knew."

Amber O'Dea,
Sales and Service Manager

"We needed planning to move away and allow the operation to treat us like an advisory service. We were managing risk, rather than managing the processes."

Jamie Campbell, Resource Planning Manager, Sales and Service

"We talk about purpose, measures and method. If we get purpose right, we can get our method right, and then can get the measures right from that. It's the method we deliver purpose by that counts."

Carmen Harvey,
Systems Thinking Lead Consultant

"Now, a year on, I can honestly say that I 'System Think' at home. I do that with my personal life, looking for the root causes."

Sally Dodge,
Resource Planning Analyst

Results

- **NPS up seven points over two years, to +72**
- **Colleague engagement nine points above the UK high-performing norm**
- **80% drop in need for TLs to validate CR requests**
- **Planning is doing more with 50% less FTE, vs 3 years ago**

"Now we use data to drive decisions. I say 'where is the data? Show me!' The planning team does this in a way that drives efficiency."

Nicola Dunning,
Customer & Operations Director

"We will support and guide, but it's their plan and their decision what to do."

Steve Roberts,
Claims Planning Manager

"As soon as your mind changes, everything changes."

Liv Harris,
Service Delivery Analyst

"The self-serve planning tool has been instrumental in empowering people. It's intuitive."

Charna Bevis, Team Leader, Motor Sales and Service

LV= General Insurance is one of the UK's largest personal lines insurers. The 2,400FTE multi-site operation features 300 homeworkers and serves 7m+ in the UK. The 18.5 FTE planning team uses multiple technologies including Power BI, SharePoint, Verint WFM, and CATsim.

Visit www2.theforum.social/2020LV for the full case study and video. We hope you enjoyed this summary

2020 Innovation & Transformation Awards

Strategy & budget planning join up the business

See how strategic resource models are evolving and driving continuous improvement, consolidated onto a shared platform with Finance, fast & flexible, with a single trusted source of data.

Summary

Learn how the Planning Team at RSA has developed as a trusted partner, with a place at the top table. It's been a strong period for planning, with 15% efficiencies, rising engagement and hundreds of hours saved in the annual budget planning process. The new, standardised planning models evolved in agile sprints, with stakeholder scrum teams. It's quicker and seamless, with a continuous improvement ethos. This creates flexibility, agility and confidence in the plan – serving 27 business areas, from Sales to Claims, Front to Back Office. Models have been simplified, automated and rebuilt in Anaplan. Savings in analyst time alone yield a compelling ROI, with further flow-through benefits later in the planning cycle and for the operation. Analysis can be turned around instantly or in hours, not weeks. It's so good because the key data is always there, with a single model framework and robust governance.

Key Initiatives

Connected planning builds confidence in the plan

Over the last three years, workforce resourcing strategy increasingly shapes business plans, as the resource planning team came to be a key player in company-wide business planning at RSA. A critical step has been building strategic resource models using the approach and system (Anaplan) used by Finance and 'baked in' to the corporate process. By stripping down and re-building 30 models into one single framework, planners created visibility at a detailed level for operating model decisions, that wasn't practical before. As a result, the level and speed of planning capability has been honed and linked with function driving people planning grow stronger. In Anaplan, Finance and Planning have separate models, but can share the same data and programme in the same language, with data/assumptions instantly available to each other. Furthermore, people share a mindset about planning and commit to shared outcomes. This helps to connect changes in the operating model with positive impacts on colleagues, customers and business – and the business can tackle challenges or resource shortfalls before they happen. "So quick" "No pain points" "Automated" "Technology does the heavy lifting".

Joined up: benefits flow throughout the planning cycle

Investing in strategic planning, the top end of the planning cycle, also drives downstream benefits in line with The Forum's latest best practice framework. This involves the whole Planning Team, not just those using Anaplan. For instance, the central 'Data Hub' is another key step in delivering end-to-end planning, drawing information from WFM, ACD, CRM etc. This feeds into Anaplan, where the models are set up for evaluation, automatically connecting drivers and impacts. The automation in Anaplan, as well as IEX and EG, has given headspace for more analytical activity by planners in all areas. A huge variety of assumptions are reviewed using interactive models, applying business intelligence and mathematical manipulation, removing outliers and striving to always better understand the true drivers behind workload and behaviours. There are great meeting cycles and review points, meaning that the Planning Team and their stakeholders are aware of changes and data relationships. People can track numbers on their journey from long-term budgeting to on-the-day analysis. "Analysts can analyse" "There's time to really think".

"Never be satisfied with the status quo. We don't say 'can we do this?', we say 'how do we do this?' We're having a different kind of conversation."

Jenny Hayes,
Head of Planning

"We're bringing everyone along on this journey, saying to a team: this is your system to use. Don't impose, engage."

Gareth Willott,
Technical Best Practice Manager

"We can now turn around inputs so rapidly ... to agree the plan quicker and with far more confidence."

Rhydian Llewelyn,
Finance Director, Claims

"It's been an evolution, we've always worked closely with the planning team but now we have greater connectivity between budget and planning teams."

Fiona Green,
Home Claims Functional Leader

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Confident: driving improvements in the operating model

Connected planning at RSA gives visibility to the impacts of different decisions, at a remarkably detailed level. Home Claims is a great example, needing huge resilience given the volatility resulting from climate changes. Previously, there was lots of multi-skilling, always difficult from a people and leakage perspective. Now the operating model has evolved, shaped by the way strategic resource plans have developed. People are more confident of the numbers and can better determine what's needed across the planning cycle. This has freed up time to invest in other systems (like IEX) and review other areas. For instance, shift patterns have improved from an agent perspective and parameters can be set to stagger breaks. And more flexible working requests are being accommodated. "We have just had the worst storms in seven years and our team are all engaged and happily working extra hours" "Attrition is much lower" "I'm so proud of what the planning team have done" "It's reshaped how we work".

Agile: evolving budget plans and continuous improvement

- The team's model is now a key tool in the company-wide planning process, with frequent budget reviews in place: weekly, monthly and quarterly. Furthermore, the team is adept at turning around multiple budget scenarios at an astonishing speed.
- Leaders focus on variance from budget and actions that mitigate this. Planning create understanding of potential impacts, risks, opportunities and financial performance. Part of many change projects, their analysis is built into the wider business plan in a measured way.
- Agile principles drive a continuing development of planning models. A 'minimum viable product' was delivered initially and now a continuous improvement ethos drives development of the strategic plan. 'User stories' show how the model should work and these are developed in Anaplan by 'scrum' teams with SMEs within the planning team.
- Crucially, new lessons were captured and learned every day, a lot of learning for a budget plan. Now the team's remit has expanded beyond traditional planning, with a key role in driving continuous improvement across the business in a data-led manner.

"So much quicker" "Go-to point for key KPIs" "Transforms recruitment speed" "We trust the data" "Really stress tested" "Sometimes, simple is the hardest thing to do"

"Combining effort and methodology enables a fluid and dynamic conversation with stakeholders."

Andrew McIntyre,
Forecast & Capacity Consultant

"The intuitive nature of the model was what came out as key in the user feedback."

Ben Clark,
Forecast & Capacity Consultant

"We have to balance various areas. Good planning helps navigate those nuances. Plans are accurate, with a more granular approach."

Fiona Green,
Home Claims Functional Leader

"We gathered hundreds of user cases. We could refer to each user story and demonstrate how it does what each user had asked for."

Gareth Willott,
Technical Best Practice Manager

"We can automatically demonstrate what would happen to staffing in a given scenario with a high accuracy. It can be a decision-making tool."

Helen Goddard,
Forecast & Capacity Leader

"We were making sure the wider team understood, linking back so they were engaged, knowing it was going to be what they'd asked for."

Hilary Williams,
Service Level Planner

Results

- **Colleague engagement up 10% year on year, now 71%**
- **100s of hours saved for every quarterly budget forecast**
- **Effort halved for the Monthly Business Planning Review**
- **Bridged a 5FTE resource gap in the team**

"Three years ago we weren't used to agile. We hadn't anticipated the huge cultural change required. This has been a cultural journey."

Jenny Hayes,
Head of Planning

"We find people are often cautious to try new things. This team jumped in with both feet. They have a 'can do' attitude. The culture of continuous improvement has been key to success."

Heidi King, Customer Success Business Partner at Anaplan

"There's much clearer visibility on where time is spent, we can see the impacts quicker and get signoff quicker. We are far more granular at this strategic plan stage."

Rhydian Llewelyn,
Finance Director, Claims

RSA is one of the world's longest standing general insurers. Planning support a virtual environment, with front & back office and blending of sales, service & claims. Technologies include Anaplan, IEX for WFM and Eg for the back office.

Visit www2.theforum.social/2020RSA for the full case study and video. We hope you enjoyed this summary

2020 Transformation & Innovation Award

Planning as a strategic capability for the business

See how 'inspired experts' in the Sky Planning Team drive innovation in planning, to bring strategic value to the business and make life better for customers and colleagues.

Summary

Sky considers 2019 to have been a vintage year for the organisation. Customer numbers, sales and profitability have all shown material increases and the Planning Team are at the heart of these impressive results. A strong commercial intellect coupled with a thirst for innovation, which puts people and customers at the forefront of their thinking, makes the team pivotal to the success. No longer just about operational efficiencies, this team is helping to shape the future strategy of the business. They run many concurrent projects, such as automation with robotics and apps, reducing customer effort and improving colleague work-life integration. Freedom to innovate, test, fail fast and learn is central to the team's culture, whilst their career pathways programme provides inspiration and development for their own people.

"Innovation is part of who we are. We get everyone involved in the process."

Eileen Petrie,
Planning Assurance Manager

"We're not just a planning team, we're a business team. Planning needs to understand the business context. Every communication, change and announcement has a touchpoint with Planning."

Colin Robertson,
Director of Planning

"I'm in awe of the Planning team and their ability to absorb change. They're absolutely integral to everything that happens in this organisation. It's a big part of profitability."

Alison Varney,
Managing Director, Sales Operations

"Students can now flex-up their hours when they want to earn extra money."

Frankie Johnstone,
Planning Architect

Key Initiatives

Building trust and driving benefit

Seeing themselves as a business function, rather than a planning team, has created a different mentality in Planning and 'commercial intellect' within the team has proven crucial in building trust across the business. Planning advise commercial teams on how to maximise benefit from products and campaigns, guiding the strategy for everything from new sites to workforce and digital strategies. As a result, commercial teams appreciate the service impacts of their actions and 'go into bat' for the Planning team, showing high levels of influence and engagement. Quarterly strategic reviews with all 200 members of the Planning team help them understand how their actions will support the wider strategy. There's a human element too; a real care for people has helped level out colleague engagement scores across the business. "It all comes down to trust" "We couldn't do what we do without them".

Planning: a strategy for adding value

To encourage fresh thinking and innovation, people in the Planning team are not limited by objectives and targets. Rather, they focus on the end goal and people can think for themselves and decide the route by which to deliver. Focus has shifted away from tactical repairing to strategic planning, 12+ months out, and the team's strategy reflects this. Based on a principle, 'inspired experts making people's lives easier', the team is a great place to work where people excel, and unsung heroes are recognised. Everyone has a clear purpose for customers (create effortless experiences), investment (efficient solutions that create capacity) and engaging colleagues (simpler processes, greater fairness and better shift patterns). Regular brainstorming and multiple ongoing projects demonstrate how a culture of innovation is embedded into the team's mindset. "Get in front of change" "Innovation is part of who we are".

Automation: bots and apps

Inspired by external learning, automating the publishing of overtime through use of robotics has been a big step forward for the team and the operation. Working closely with their technical colleagues they sourced a 'bot' used for customer service processing during the day but completely unutilised at

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night. The overtime process was repetitive and 'admin rich' – ideally suited for automation. Taking only six weeks to implement, it has enabled better targeting of overtime slots, created a consistent, simpler process for front-line colleagues, saved time in Planning and reduced early drop-outs – a true win-win. Further success in automation has delivered a new dashboard via an app for ops leaders to help manage holiday usage more effectively, identify unfairness in bookings and resolve colleague dissatisfaction. "We use technology in the right way" "We've gained much more control"

Customer: invisible IVR and infinity routing

The Invisible IVR project has made it easier for customers to navigate the IVR and increased customer identification rates, without hitting handle times or transfers. With little budget, creative thinking across multiple stakeholders used learning from other organisations and focussed on changing the language and wordings in the IVR. They also maximised the use of the huge amount of customer data available. As a result, time in IVR has virtually halved, direct routing is up 20% points and 85% of customers are identified – breaking the previously perceived glass ceiling of 80%. In addition, infinity call routing allocates a bespoke phone number to an individual customer based on the page they were on at Sky.com – helping to identify both the customer and the reason for contact. "Get the most out of what we've got" "Remove unnecessary questions" "Strip back the IVR".

Innovation for people

Crucially the team has a major focus on their colleagues, both outside and within their own team.

- **Part-Time Flexi-Working** – better shifts, improving work-life balance and retention for new part-time advisors, whilst improving cover at key parts of the day; making more flexible working the norm rather than the exception.
- **Improved Planning Packs** – better transparency and consistency of data with more detailed and long-term insight to provide greater understanding of the numbers and to increase advocacy of the team from their stakeholders.
- **Career Pathways** – inspiring and supporting development of planners; setting out key attributes and development levels of all roles to create a meritocracy where people move up levels and are rewarded for the value they bring to the business.

"Hugely interactive" "Engaging for colleagues" "Easy to use" "A clear pathway for everyone".

"We're not precious about our changes. If it's not working, we take it out. Sometimes you'll fail and fast. The key thing is how you learn."

David Laird,
Senior Planning Manager

"I wouldn't have had the confidence to apply for a different role if I hadn't been through the pathways. It's so useful, different perspectives brought things to life for me."

Aileen Lowrie,
Planning Architect

"We looked at how to get more from technology already here. We identified processes that were admin and process rich. It frees up time in the Planning Team to do value-add work."

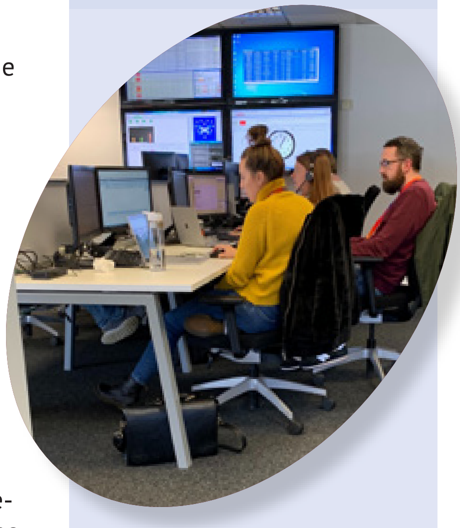
Grant Holden,
Business Analyst

"How do we help people progress and get ready for the next role? The team recognise we are trying to do something for them."

Paul Comrie,
Senior Planning Manager

Results

- **15% improvement in NPS**
- **12% point increase in revenue year on year**
- **12% points increase in profitability**
- **Time in the IVR nearly halved**



"We've turned ourselves into a thinking team, not reacting in the moment but taking time to think in advance. We understand commercial priorities in detail, then we can work to help deliver them."

Colin Robertson,
Director of Planning

"By far the best Planning team I have ever encountered. They are focussed on looking up and out with a forward-looking view on what is the best out there. Commercial teams are now thinking customer rather than product."

Alison Varney,
Managing Director, Sales Operations

"Make it visible, try it out – get feedback, we can pull it, adapt it or completely change it."

Gareth Wrethman,
Workforce Management Analyst

Sky provides leading news, sports and arts content across multiple platforms. In the UK Customer Services Group, the 200 strong Planning Team use NICE IEX WFM and Oracle to support 9,300 contact centre colleagues and 3,700 field engineers who support 12m customers, 400k unique customer calls and 55k home visits per week.

Visit www2.theforum.social/2020Sky for the full case study and video. We hope you enjoyed this summary

Planning & insight: the heart of an improvement culture

Empowerment and ownership has given analysts confidence to work in a new way with stakeholders across the business, build new solutions and improve forecast accuracy.

Summary

An empowering innovation culture is driving significant and sustainable change at Three Ireland, based on a core value 'one team'. It's a great place to work, where anything seems possible and a simple development can have huge impact when passionate people pull together. A collaboration by Planning & Capability Transformation teams, 3 Cal is establishing a culture of planning ahead – seamlessly building on their award-winning real-time model to focus earlier in the planning cycle. It is now used across the business to plan activity with customer or colleague impact and has helped reduce forecast variance (from 20% to 2.5%) because activity is visible and built into the plan. Engaging with the operation, including Tech Mahindra in Mumbai, built ownership and embedded changes in the culture, so that everyone now better understands the impact of their activities on customers.

Key Initiatives

Strategy and values lie behind this success

Since 2015, the company has been on a long-term programme of digital and cultural transformation. Their strategy involves becoming omnichannel ready and underpinning culture with five key behaviours ('Our Way Behaviours') that shape everything they do. So that the values continue to be lived, not just slogans on the wall, three values now support them: Empowerment, Ownership and Achievement. People are empowered to ask the difficult questions and given the tools to deliver. To achieve this, development is key and everybody is encouraged to spend one hour a week learning on top of the normal coaching, using resources such as: LinkedIn Learning, university and external courses. The 3Cal project is a product of this learning, applying Six Sigma principles. It is also an enabler to future learning allowing events to be planned in and safeguarding learning time. "The values we had 3 years ago are still here, they are our DNA".

Establishing the need for better planning

The planning team recognised a lack of advanced planning and visibility for many activities, including training and marketing. This made it impossible to forecast and schedule with any degree of accuracy. It's a big problem for planning, but one they couldn't solve alone. They needed to change behaviour throughout the operation, to show that 'a planning problem is everybody's problem'. Before looking at solutions, they spent time with all areas of the business, working together to understand how these issues and their behaviours impacted their goals and the customers. Using learn fast/fail fast methods they established a need for a culture of planning, where everybody has ownership and understands the requirements and success measures, they need to deliver. A culture of mutual trust and communication. This allowed them to create a solution that worked for everybody. "When everybody saw the benefit, they appreciated it".

3Cal: building the solution

Planning then worked with the Capability Transformation team to develop a solution together, a great example of empowerment. They created a calendar, to join the organisation together, where anybody could add events and see potential conflicts. Users are asked for information like timing, value,

"What we are doing is different and it is having an effect on our customers. This is a tangible demonstration of collaboration."

Ashley Cook,
Chief Customer Officer

"It is not just about planning, it is about the customer."

Jane Sexton,
Share Service Manager

"It is not about freeing up resources to reduce, we are freeing up resources so we can grow."

Cait Mulcahy,
Capability & Transformation Manager

"3Cal allows us to relate events to NPS anomalies. It streamlined everything."

Siobhan Ryan,
Voice Manager

"It has made life much easier. We are now aligned with resource planners."

Emer O'Connor,
L&D Lead

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categorisation and expected impact, which enables the planning team to schedule, resource and prioritise where necessary. Crucially, there is an option to make sensitive events private, so that they can be planned for and resourced without being made public. The teams built this, using FUSION, their self-developed unified agent desktop and reporting suite. This made it possible to tailor the solution, integrate with existing real-time tools and continuously evolve the solution. Two developers spent one month creating the solution, before the Capability team system tested this and Planning completed user acceptance testing (UAT). This is more than a tool, it supports the culture of responsibility in the business. “We wanted something completely our own”.

A culture of planning ahead

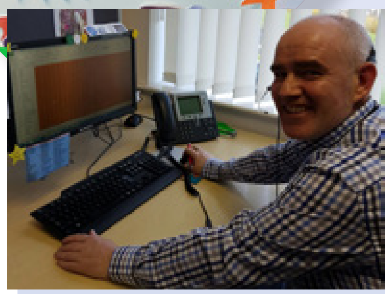
With the new approach, there are three stages where an event or activity can be booked in: 5+ weeks out, 6+ days out or less than six days out. Significantly, if a request is made at the five weeks out stage this can usually be resourced, because most shift patterns are agreed four weeks ahead, and there is a high probability of the event being planned in. Shorter time frames are subject to availability and have a higher probability of being refused. The new approach has led to many benefits. For instance, increasingly people plan ahead; they realise that although there is sometimes the need to react at the last minute, this can often be avoided with advanced planning. Also, it’s been possible to work more closely with Tech Mahindra, the offshore outsource partner, giving them the information and context they need to create schedules and do real-time planning. It’s also encouraging people to think outside their own silo and consider the impact on others. “It puts manners on the process”.

Insight: closing the loop

Key to their cultural ethos is using planning and insight to enable improvements for customer and colleagues. 3Cal asks users to provide valuable insight to improve planning and forecasting meaning resources are made available at the time the customers need them and colleague’s development time can be safeguarded. Subsequent analysis of both pre-planned and unplanned events, is allowing them to refine their models, and improve forecast accuracy. However, they are also giving something back and closing the loop with their end users, using insight to bring their stories to life by showing the outcomes of their events and marketing campaigns. Enabling colleagues to continuously improve their own processes and prepare for the future. “Some areas did not realise the impact they were having on their customers”.

Results

- Internal NPS for Planning at +92
- Deviation from forecast cut from 20% to 2.5%
- Saving €10k per month in costs of overstaffing to deal with volatility
- NPS remained at +80 despite going through a huge transformation programme
- Fewer surprises means less need to reforecast or reschedule, freeing time in planning for value adding activities



“We care about our people and we balance the need for training with customer impact. 3Cal enables us to balance the needs.”

Ashley Cook,
Chief Customer Officer

“We depend on it; it is our way of working.”

Karen Hickey,
Assisted Experience Manager

“3Cal is saving money in people not having to be in unnecessary meetings.”

Norma O’Neill,
Change Specialist

“We focus on what we need to do to resolve and prevent an issue rather than why did it go wrong.”

John McCormack,
MIS & RTA Team Lead

“A person who feels appreciated will always do more of what is expected. Daily communication is key.”

Dick Fitzgerald,
Operations Manager

“There is no way of missing things. It is a great source of historical data.”

Rebecca Culhane,
Resource Planner

Our Way Behaviours

- We focus on our customer
- We go beyond the expected
- We work as one team
- We take responsibility
- We appreciate each other

Three Ireland is the second largest mobile operator in Ireland with 36% market share, 2m customers and over 1,400 employees in Ireland. Customer Care Centres are in Limerick and Mumbai, with 68 retail stores and a Dublin HQ. Systems used include Qualtrics, Salesforce, Liveperson, Lithium, TechM, Amdocs, Verint and Cisco.

Visit www2.theforum.social/2020ThreeIreland for the full case study and video. We hope you enjoyed this summary

Chatbots are transforming the online sales journey

See how a small team pioneered live chat and chatbots for sales, differentiating customer experience, cutting the length of chats by a third and raising conversion by 11% at key times.

Summary

Chatbots and live webchat have been pioneered at AA Ireland to grow sales and make the online experience far better for customers. Crucially, this didn't require major resource and, as a pioneering customer of ServisBOT's Conversational AI Platform, a single manager powered this transformation, building up the webchat sales team then delivering chatbot automation, in just eight weeks. The Bot has become the first point of contact, completing many questions and handing strong leads to an advisor where it doesn't yet have the answer, or a more personal touch is required. A test and learn approach was used and advisors were fully involved, incorporating their expert knowledge of objection handling with the ability to make valued suggestions to customers. It's been a huge success, showing what a small team can achieve, and the use of Bots is expanding, to become a strategic driver for the business.

"To see the uplift in conversion was very positive. It has given us the ability to do more cross selling and operational capability for retraining."
Nicole Feighery, Director of Contact Centre Operations

"You need to expose Bots to customers early. Create laser focussed Bots that solve one enquiry at a time."
Chris Doyle, Co Founder and Lead Engineer, ServisBOT

"We have a conversation, not just a quote."
Dee Roberts, Director of Contact Centre Transformation

"It is wonderful to see a heavily regulated industry trust a Bot."
Phillip Hewetson, Director, ServisBOT

Key Initiatives

Start with a clear customer vision

Crucially this development was driven by the business, not IT, all about making the most of online channels and creating a great customer experience online. Insurance customers, in Ireland as elsewhere, are increasingly using online channels to find the best deal. Yet cost per click is expensive, so it's important for The AA to make the most of these. Furthermore, only 10% of online customers go on to call, so it was important to converse with the other 90% in a different way and be seen by customers as adding value. Identification of needs was therefore a key first step, to make the online journey work better for customers and increase sales conversion. What's more, the ServisBOT platform meant that practitioners themselves could implement an innovative service, without the traditional IT barriers, and they found that chatbot adoption was strong across all types of customers found at this 110-year old, trusted insurance broker. "If customers are online, we need to be too"
"A clear business case".

Chatbots: blending automation & the human touch

With automation, fear is natural for advisors: will it replace me? Understanding these fears, and fully involving the team, put minds at rest. This demonstrated how humans and machines can work together and how webchat can develop as a result, serving more customers with the same people. In 2018 a small team was set up by the Customer Lifecycle Manager to pioneer sales on webchat. She rapidly learned what worked for customers and proved that chat could be a great sales tool. Within months, she used this knowledge to pilot a Bot, automating parts of the process and drawing learning from the live chat team. Working with ServisBOT and engaging advisors to test and develop, she explored the online journey to understand where chatbots could add value and where the human factor was most valued. Chatbots became the first point of contact, completing many questions about customer details and requirements. This meant that, if calls were transferred to an advisor, these were interested customers needing experience or a more personal touch. Chats took about a third less time (down 33%), so in fact the human team is now dealing with more customers, generating more sales and earning more commission! "The Bot's our little helper" "I didn't realise it could do that".

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The Quote Helper: a test and learn approach

The Bot didn't need to do everything from the start, so they deliver one thing at a time, in AGILE sprints, identifying a Minimal Viable Product (MVP) for each. What the Bot didn't handle came through to the advisors, so the developer was always learning from them how to support a customer's online journey and looking out for the next step. Experienced advisors showed how to overcome objections in chat conversations. This is collaboration between human and machine, not just across departments. For instance, cost is key to customers, and experienced advisors can bring down premiums without affecting margins by finding the best possible product. Insurance logic can be counterintuitive and for some people adding a second driver to a policy lowers premiums. In other cases, adding on benefits such as roadside recovery may also reduce premiums. When programmed with clear questions, the Bot can be very good at this and is very consistent. Hence, it is now positioned as a Quote Helper, identifying opportunities to offer value to the customer and interject at these points. "What is the smallest thing we can do to create the maximum value?".

Personalisation and building on success

All in all, the expansion of the chat team is a big success story at AA Ireland.

- From the outset it was agreed that chatbots would not try to imitate humans and customers would be aware when they are talking to a robot and when to a human.
- The language and personality of the chatbot was key and a content manager worked closely with advisors to understand the best ways of communicating a message and be sensitive to 'brand voice'.
- In all this, the team has become more proactive. For example, SMS messaging linked to Quote Helper gives the team the capacity and tools to contact customers at the time they are due to renew other policies. They've also benefited from learning how others have developed, for instance drawing on support and collaborating with their supplier.
- Reallocating time saved by Quote Helper, the chat team can now support customer service as well as sales, and the iterative chatbot development continues. The project is expanding to cover other areas, becoming a key strategic driver for the business.

"Many people go online because they don't want to speak to people" "This shows what a small team can do when spearheaded by someone with drive and empowerment".

"We could meet and discuss fears. We want to make people better at what they do. We are doing more with the same resource."

Dee Roberts, Director of Contact Centre Transformation

"We spoke their currency. Bots must deliver the benefits of service that an agent does."

Nicole Feighery, Director of Contact Centre Operations

"Ask: what is the smallest thing we can do to create the maximum value? Pilot with a small number and monitor, don't hold back for the perfect user experience."

Chris Doyle, Co Founder and Lead Engineer, ServisBOT

"I didn't think it could do what it could. It is our little helper."

Jordan Welstead, Webchat advisor

Results

- **12% fewer live chats and 33% drop in AHT**
- **11% cut in webchats abandoned**
- **Out of hours conversion up by 11% since start of Quote Helper**
- **Motor Quote Bot delivered in 8 weeks**
- **4,000 chats a month handled by Quote Helper**

"The chatbot has taken the agents' expertise and put it into the system."

Arwen Foley, Content Manager

"The experience with ServisBOT has been brilliant; they let us do what we needed to do."

Kate Molloy, CRM Analyst

"I was surprised at how much it can do."

Darren Reilly, Supervisor Web Chat

AA Ireland is Ireland's premier motoring organisation. They provide emergency rescue for people in the home and on the road. Well over 250,000 Irish consumers are customers of the AA. The AA puts information into the consumer's hands. They use Zendesk for chat and email case management and ServisBOT for their chatbot automation.

Visit www2.theforum.social/2020AAIreland for the full case study and video. We hope you enjoyed this summary

How omni-channel transforms customer experience in retail

See how social media, CAI the Chatbot and a new digital platform are empowering advisors, delivering a dramatic improvement in customer satisfaction and future-proofing this 200-year old brand.

Summary

The digital team, and their technology partner Cirrus, have been a catalyst for radical changes at Clarks Shoes over the past 18 months. This has been transformational for both colleagues and customers – and opens up the brand in new ways to their global market. CAI, the chatbot, now takes 70% of incoming contact, half of them out of hours, resolving three quarters, with an 83% satisfaction rating. Fourteen systems have been combined into a unified desktop for advisors and data is captured across every touchpoint. As a result, the business can now listen to what customers want and colleagues feel they have a hand in owning the customer journey. Customer experience is handled in a measured way end-to-end, with a massive uplift in their independent Trust Pilot rating to 8.6 (Excellent). It's a demonstration of how true supplier partnerships can power change in a receptive business.

Key Initiatives

Future proofing the Clarks brand

Simplicity & listening to customers are key ingredients of success today at Clarks. This was nurtured by a passionate leadership team, led by the digital team in marketing, powered by their technology partner Cirrus and made possible by transforming technology and process in their customer operation. It's a far cry from how things were just 18 months ago. Poor customer experience was damaging the brand, seen in social media comment and service performance. Transformation began with recognition, from the top execs, of the need for change. Advisors had to navigate 14 systems. Just to get authorisation to replace faulty shoes by next day delivery, it could take 20 minutes of a team leader's time, navigating five systems that were not even open to an ordinary advisor. Furthermore, changing shopping habits and heavy seasonality meant that incoming demand (eg Back to School or Black Friday) required resource that was not readily available. "Ageing systems" "Archaic process" "We needed to modernise".

Omni-channel: a new digital platform

Customers need faster answers and choice about how to contact, so the first step was to tender for a new multi-channel platform. In selecting Cirrus, Clarks found a partner who brought experience from outside and an outcome focus. Working with the CX Operations Manager in the Digital Team, they took the company's objectives and challenges, designing solutions to fit that purpose. For instance, it was Cirrus who suggested the use of Conversational AI (chatbots), transformational for Clarks, and demonstrated the potential of social media. A new ContactUs web page was an early step, helping people find the quickest or best way to resolve their issue. Then the unified desktop, provided by Cirrus, allows agents to be queued work according to their skill levels and incoming demand, across every channel. Items are tagged at the point of receipt, for every customer touchpoint, from website or instore fitting experts to the contact centre. "Trends can be detected" "We can respond in real time" "Social reporting raises efficiency" "Information is shared across departments".

"Keeping the system simple means we can quickly train extra agents at peak times. We can act quicker with common trends and we can share those with other departments."

Debbie Pierce,
Contact Centre Manager

"It wouldn't be unusual to see 60% of queries resolved by webchat. And simplification across the board enables agents to take responsibility in resolution."

Ben Newbon-Stead,
Digital Operations

"Customers have that sense that we put our customers first, we feel it."

Max McCartney,
Customer Advisor

"Everyone will get to go on a fitting course ... knowing about how that's done helps us to advise and resolve their issue quickly."

Emma Wilkins,
Customer Advisor

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CAI the chatbot: conversational AI

CAI (Conversational AI) offers personalisation and intimacy, yet also enables an end-to-end automated customer journey from the website. CAI is available 24 hours with no days off and became the third most popular way to contact within four months. Crucially, more than half the queries are 'out of hours', making Clarks far more accessible in a global, multi-generation world, and it's estimated to be saving around £1,500 a month. Designed to be a service bot, customer resolution was key. With AI, it learns how to resolve queries, and not handover to agents when it isn't necessary. Agents learn how to communicate effectively with queries that initiate from CAI. What's more, the first service was rolled out in just one week. Launching first with a basic tracking service, CAI gradually learned all about Customer Services and the frequently asked questions (FAQs). Today, CAI triages 70% of all incoming volumes, resolving 73% of the contacts it touches with an 83% satisfaction rating. "CAI is a symbol of the wider change" "It was challenging" "An exciting journey of discovery" "We've caught up rapidly in the digital space".

Learning to listen: empowering advisors & customers

This has been transformational for people as much as technology, releasing a world of new opportunity. Customer ratings on TrustPilot shot up from Very Poor (2.5) to Excellent (8.6) in just a year. Advisor utilisation across all channels is up 17%. In the contact centre, employee attrition dropped 60% and calls are far shorter. Social Media take-up rose 10% points in the first year, with responses in 30 mins not days/weeks. What's more, far more can now be done for customers. Where advisors had limited powers, with IT restrictions, their role has now opened up. They can offer discounts, explain that 'little things make a big difference'. They have full access to the customer history across each touchpoint, so decisions and actions can be guided by what is best for each customer. It's a bespoke service that is a remarkable step forward for the brand. Live coaching by experts in all channels improves quality, measured from both customer and agent perspective. Advisors are highly motivated, proud of their new reputation as trusted brand advisors. As they say, this was achieved by giving them trust, control and ownership, alongside better tools to do their jobs with. They are listening to what customers are asking for and able to resolve issues quickly. "Great customer service" "We've never been this effective" "You can do any course" "You just ask for what you are interested in!"

"We have a young team that embraces technology. The bot takes the bulk out of it and we are now able to concentrate on problem solving in calls. We try to develop people, cross fertilising in training and empowering them to have accountability with customers to resolve issues. We take advantage of the skills we've got."

Debbie Pierce,
Contact Centre Manager

"We set out to enhance the learning experience, be that in Stand-up Sessions or The Power of an Hour or elearning. We had to speculate to accumulate and it's proven to be worth it."

Hazel Bradbury,
Chief Compliance officer

"The most important thing for me is that it's reduced call waiting times in busy periods like school holidays."

Gary Tonkins,
Technology Project Manager

"However the customer contacts you, you see their history … we can measure skill based duration and first-time fix. An agent is assigned the right amount and nature of work for them."

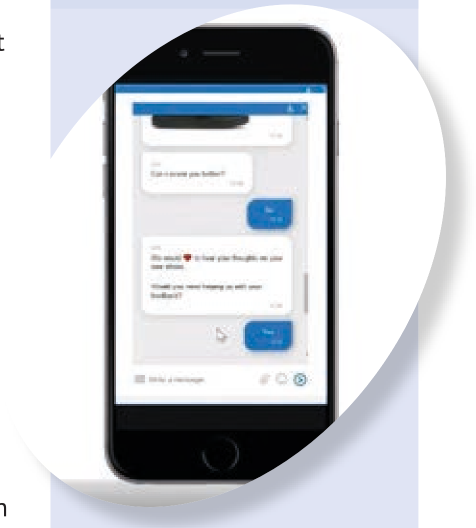
Ash Pieczynski,
Customer Success Manager at Cirrus

"The feedback you get from your Team Leader is immediate, you get it straight away while it's fresh in your mind."

Max McCartney,
Customer Advisor

Results

- **Trust Pilot rating up from 2.5 (Very Poor) to 8.6 (Excellent) in just 12 months**
- **Staff attrition down 60%**
- **Answer rate up 6% points**
- **One consolidated customer inbox**
- **Advisor utilisation up 17%**



"The main thing for me is the chatbot is doing the right things for the customer."

Laura Hynds,
Digital Operations Support

"We now have access to the reward codes so we can directly offer customers incentives; we're allowed to use our better judgement."

Emma Wilkins,
Customer Advisor

"We never went to market with something like webchat in mind, but it's performed really well. It's driven down abandonment rates, waiting time."

Ben Newbon-Stead,
Digital Operations

Clarks leads the world in casual footwear, with 200 years of expertise, sending out 75k items daily. The 60-strong Customer Service team in Somerset serves 10k customers a week by phone, chat, email & social channels. The Omnichannel platform, telephony and Chatbot AI is supplied by Cirrus.

Visit www2.theforum.social/2020Clarks for the full case study and video. We hope you enjoyed this summary

Building a culture of wellbeing: dashboards & coaching

See how new PowerBI dashboards are driving actionable insight to support a new style of performance coaching and a culture of wellbeing and engagement.

Summary

A desire from the very top of the organisation to promote wellbeing and engagement has been embraced at all levels within the contact centre operation in Retail Protection at L&G. This transformation is being driven by a new approach to performance coaching, the new capability developed in the Insight team and great collaboration across the business. Partnering with external expertise brought in fresh thinking and the skills and knowledge transferred in-house is transforming the role of the MI & Insight team. Furthermore, this initiative has been pioneering the use of PowerBI dashboards in the business. This has all driven great excitement in teams, Team Managers have more time to spend with their teams and colleagues feel more supported and empowered whilst early results show marked improvement in attrition and absence.

Key Initiatives

Driving transformation and a culture of wellbeing

Learning from FinTech companies has inspired a culture that is transforming the Insurance business, driven from the CEO. This enables agile working, rapid development and workplace wellbeing. Mental health is a key focus across the whole business and has been wholly embraced by Retail Protection. Recognising that key reasons behind absence and attrition rates were often linked to anxiety, stress and depression, they embarked on a programme to completely revamp how colleagues are supported and coached including a fresh perspective on the type of objectives and measures in use. This has resulted in a coaching culture being driven very much from the leadership down. Directors' objectives include reference to staff having standardised coaching sessions and 1-2-1s every month – and these are never cancelled irrespective of service. In essence, this is both a strategic and people-focussed transformation. "We're designing and driving a coaching culture" "It's really being driven top-down".

Shaping new metrics & dashboards in PowerBI

L&G partnered with The Modular Analytics Company (TMAC) to bring in new thinking and capability. TMAC brought in advanced skills to fast track the use of PowerBI and, crucially, worked with the MI and Operations teams to shape the right metrics and evolve the look, feel and value needed from the user experience. This very collaborative process ensured metrics were kept to a minimum (just four initially), used gentler language, became more customer-centric and engaged colleagues in meaningful, positive coaching conversations. Working at pace and through an iterative process, visual, accessible, self-service dashboards were delivered in just six weeks. Further engagement with MI enabled skills transfer and the team is now using and evolving the templates for other areas. "The collaboration was excellent" "It's not an MI tool, it's a coaching tool".

See how coaching can underpin wellbeing

The new dashboards have helped underpin the way coaching supports colleague wellbeing – helping to tackle certain causes of absence in the contact centre, such as stress, anxiety and depression. Enabling a change in outlook, simple, quintile scoring moves coaching conversations away from hard numbers, to

Legal & General

"Colleagues are relishing the time they get to spend with their Team Manager. It gives people the visualisation to help analyse and understand trends."

Henry Carman,
MI & Insights Manager

"People have their eyes opened by seeing where they are in relation to their peers. Engagement is blossoming, absence is plummeting and attrition levels are very low."

John Trace,
Head of Customer Service

"Team Managers are pivotal to everything, we're creating as much time as possible for them to do coaching. It's not a performance dashboard, it's a coaching dashboard."

Adrian Downey,
Service Delivery Manager

"The dashboard is absolutely amazing. I feel I can be a better me."

Tony Robins,
Customer Service Consultant

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behaviours and wellbeing considerations that impact performance. A standard approach ensures everyone is coached in the same way. ‘Curiosity trees’ help Team Managers create the right conversations; asking appropriate questions while the dashboard data evidences performance and highlights where colleagues may be struggling. Managers and colleagues benefit from seeing the data all in one place, saving managers’ time and self-motivating colleagues. Engagement scores are up and a far greater proportion of colleagues are meeting or exceeding standard expectations than before. “It’s all about coaching here” “It creates a conversation”.

Let the data define where it takes you

A crucial part of the transformation journey is a very deliberate strategy to encourage and enable data led decisions. The MI Team’s role is evolving from report building and data engineering to data translators; helping stakeholders see what sits behind the data, presenting it back in simple ways and working very closely with stakeholders to close the loop on data and insight validation. Creating innovative dashboards and working with Ops to maximise the user-experience is a key part of this. Insight arises from the users of PowerBI (primarily Ops) interacting with the dashboards or from data analysts (MI Team) but either way it drives action. This is re-shaping some roles within the MI Team with translator roles being split from technical/data roles ensuring key skills are not diluted. “We can talk the business language” “Being the translator is really powerful for us”.

Managing data to exploit capabilities in PowerBI

The management of data and many new ways in which it is exploited is truly impressive. Many challenges needed to be overcome – for instance caution around data access, complexity of using PowerBI and building stakeholder confidence in new data. The MI Team has achieved this through a number of initiatives:

- Creating data dictionaries and dashboard summaries
- Building reciprocal, supportive relationships with data owners
- Creative use of hierarchies in PowerBI through row-level security functionality
- Focussing on user experience and purpose
- Changing traditional language for key metrics
- Major security protocols for every database

The results are impressive and have created a robust platform to expand the capabilities across the L&G Group as a true shared service. “You can’t argue with the data” “We needed to unlock the data”.

“It shows how I can change my behaviours to do a better job. You can see it yourself; you’re not in the dark.”

Scarlett Willams,
Customer Service Consultant

“Dashboards enable us to share information with our teams. I say, where do you want to start; what do you want to talk about first?.”

Sean McCarthy,
Team Manager

“We tailor the coaching based on personality; we give the numbers context. Coaching helps people; it helps embed change and move in the right direction.”

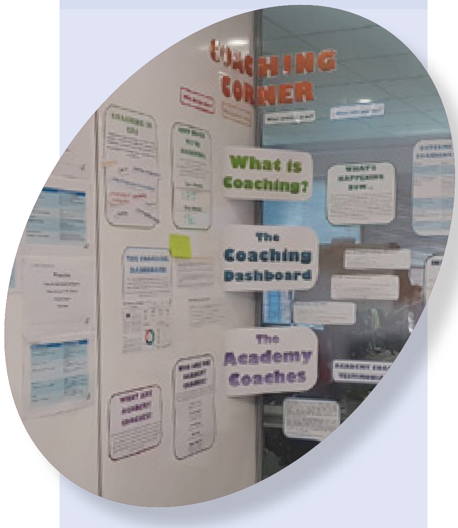
Kate Bulger,
Team Manager

“There’s lots of focus on you and your development. It helps you target the things you need to work on.”

Tim Cook,
Customer Service Consultant

Results

- **17% reduction in attrition 2019 v 2018 and lowest since 2016**
- **AHT reducing**
- **Engagement score up 9% (related to time spent being coached)**
- **Manager time spent coaching increased 60%**



“You can change perception just by changing the language.”

Craig Ide,
Senior Operational Planning Manager

“I’ve developed better relationships with my team through coaching and dashboards bringing all the info in to one place.”

Jo Knight,
Team Manager

“It’s changing the way we think about objectives. We got to the value very quickly then transferred and embedded the knowledge into the team. It’s customer and colleague centric not cold hard numbers.”

Sean Northam,
Consultant, The Modular Analytics Company

The MI & Insight Team in **L&G Insurance** are part of the wider Operational Planning Team. They are using PowerBI dashboards drawing data from multiple sources including SQL, Excel, Access, Cloud Data (Snowflake) to support the 800 FTE strong Retail Protection area.

Visit www2.theforum.social/2020LGDashboards for the full case study and video. We hope you enjoyed this summary

AI & process transformation at pace and scale

See how two rapid innovation programmes are transforming the billion-pound delivery of fibre networks nationwide, engaging people and generating more than £1m efficiency, in less than a year.

Summary

Innovation expertise, recruited into Openreach, has been a catalyst for rapid transformation, with field engineers, support teams, unions & managers all onboard. A pioneering Machine Learning algorithm was developed in close collaboration with experienced engineers. Network Enhanced Analytics (NEA) predicts non-value activities and automatically reallocates resource to create capacity. In the service desk, process & systems transformation led to a new single Heads-Up Display (HUD), replacing 27 different systems. This radically simplified the service experience, for colleagues and customers, with calls down 30% and 16% faster. Both were delivered in only a matter of months and now an embedded continuous improvement culture means these solutions are sustained and continually developed. As a result, the new FTTP network can be rolled out faster and at lower cost.

Key Initiatives

Innovation drives efficiency and speed in FTTP roll-out

Investment in the roll-out of Full Fibre into all premises in the UK (FTTP) runs into billions of pounds and Openreach faces major market/government pressures to do this faster and at much lower cost. Complex systems and operating models were driving cost and non-value work, impacting employees and customer experience. There was such a huge reserve of data that it was hard to use and a totally new approach was required, with expertise brought in to pioneer change and deliver 'first time, every time, on time'. Machine learning was implemented to predict and remove waste activity for engineers across Britain in only three months. HUD consolidated up to 27 different desk-based systems into one display in just five months. Crucially they were delivered with no compromise in standards and provide a template for global roll-out and wider operational transformation. "We were failing" "We needed a fix" "We had to go faster and rip out cost".

NEA: turning hindsight into foresight

Network Enhanced Analytics (NEA) predicts wasted engineer activity before it happens and removes it by changing the work plan. This first-of-its-kind machine learning algorithm addresses a problem that has been unanswered globally across the field industry. Close engagement with experienced engineers identified the potential to avoid significant non-value activities. Machine Learning replicates this knowledge, accessing vast data and building multi-level decision trees to create a random forest, essentially like a giant game of Guess Who! This algorithm forecasts within 98% accuracy where non-value activities would occur and therefore engineer time was redirected to focus on value-adding work. Since April, over 3,500 man-days of non-value activity has been removed, equivalent to 40 minutes per order or over £1m in efficiencies already. "There's a crazy level of detail in there" "It's given me capacity".

openreach

"It's an absolute step change across the business. It's made their lives so much easier and their work so much faster."

David Bruce,
Senior Manager FTTP Innovation

"We deliver in a sustainable way. No shortcuts; this is non-negotiable for us. We will not compromise on standards."

Bev Hullock,
Senior Manager FTTP Major Programmes & CI

"We get much more insight on the day now – we wouldn't have had that before. It's had a massive impact on planning; we can balance our resources a lot better"

Darren Bracey-Wright,
FTTP Transformation & Change Manager

"The biggest win is having something that saves time and makes the job easier."

Darren Chappelow,
Customer Champion

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Machine Learning: how data gives confidence

Specialist, local expertise of engineers was key in defining the problems for data to solve. Every customer journey was mapped, so that vast volumes of data are viewed from multiple perspectives. Machine Learning searches, finds a result, refines and iterates to get a final answer, creating insight not available before but totally relatable to engineers. Roll-out was initially a small scale pilot in one area – done without telling the engineers to avoid prejudicing results. The maths behind it was so robust the team knew it would be successful, and it was, giving engineers total confidence. Crucially parameters are dynamic and can be flexed to free up more capacity in times of surge demand while the insight informs strategic planning with predictive capability of future specialist skills and equipment needs. “It’s maths” “It was literally no risk” “I knew it would work”.

HUD: built by the people for the people

The Heads-Up Display (HUD) has transformed the service desk team, who previously navigated 27 different systems. This was time consuming, frustrating for advisors and customers and prone to error. Now an intuitive desktop means that agents respond quickly, easily and with confidence. The innovation team created a ‘one-truth data lake’ and used this to build an inhouse CRM as a single access point to all systems. End-users were central to design, identifying pain points, design requirements and continually refining to get to a working solution. Significantly, like most websites and apps, HUD is so intuitive that it doesn’t need a training manual. Training was simply ‘having a go’ in a supported environment and became a way to gather ideas for further enhancements, many of which have now been delivered. “Everything is one or two clicks now” “It’s made conversations with the customer easier”.

Human-centred design and fast-paced change

Like the best AI & process transformations, human-centred design and a consultative approach are at the core of everything for the Innovation & Transformation Team. Customers and colleagues, from across the business, were central to the discovery and design phases of both NEA and HUD. Crucially colleagues feel listened to and real-time feedback mechanisms now drive continuous improvement. Agile is used to drive pace. Two to three sprints create an MVP (minimum viable product) then further sprints refine and enhance. For HUD, new sprints currently drop improvements every two weeks. HUD is proving as valuable for customers as it is for desk teams and is now rolling out to other teams across Openreach. Great communication from top to bottom brings everyone on the journey, while the significant savings to the bottom line are being reinvested to power major future growth of FTTP delivery. “They really listen to us” “It’s improving all the time”.

“I don’t know where we would be without this model. We needed a relatable model – engineers understand it, so they all have faith in it. The way it was designed was very consultative.”

Hamish Foster,
Senior Manager FTTP Delivery

“The feedback mechanism allows us to feel like they’re listening to us.”

Avril Price,
Customer Service Advisor

“We need to deliver faster speed, get people connected and drive the digital economy. We had to make it commercially viable but improve the customer experience.”

David Bruce,
Senior Manager FTTP Innovation

“Data tells you one thing; spending time with people gives you the best insight.”

Saj Chopdat,
FTTP Innovation Manager

Results

Network Analytics

- **3,500 man days of engineer time saved since April 2019**
- **40 minutes per FTTP order saved**
- **+£1million savings in field engineer resource (reinvested for growth)**

HUD: Heads-up Display

- **Contact propensity down by 30% in CP HUD**
- **AHT 16% lower in contact centre**
- **System usability score >90%**

“We couldn’t have done this if we hadn’t worked so closely together.”

Bev Hullock,
Senior Manager FTTP Major Programmes and CI

“We can spend more time doing quality work for the customer now.”

Darren Chappelow,
Customer Champion

“It’s always improving – you can just send in your suggestions.”

Sirbjit Panesar,
Customer Service Advisor

Openreach maintains the local access network for 31.8m customers, supporting 300m phone calls, 8m broadband lines and 350m internet connections every day. 2.3k skilled field engineers and 350 desk agents (UK and offshore) are dedicated to delivering FTTP across the UK. Most systems used are built inhouse.

Visit www2.theforum.social/2020Openreach for the full case study and video. We hope you enjoyed this summary

Transforming sales: joining together for the customer

See how sales opportunities doubled in a challenging market, by embracing customer service principles in sales and focussing on colleague engagement, proactive contact and value-add actions.

Summary

A cultural transformation within sales at RS was supported by collaboration with the insight, planning and quality teams. By focussing on what is important to customers and colleagues, the sales teams evolved to meet the needs of a changing marketplace. Colleague feedback and engagement played a crucial role in this, adapting established best practice for customer service to help colleagues succeed in sales. Sales opportunities doubled, a 200% increase in the types that were most effective. As a result, turnover grew 5% and customer Net Promoter (NPS) & Net Easy (NES) scores each rose by 20 points. Significantly, this new operating model provides the benefits of personal client relationships, while bringing in a more centralised function, driving efficiencies and refocussing resources on value adding roles and activities.

Key Initiatives

Project Optimus: the business decision to revolutionise sales

The need for efficiency, whilst providing consistent and personalised sales support, was the key driver of the decision by business leaders to transform the already successful sales function. Working with the Sales & Service Effectiveness Team, Project Optimus set out to improve customer experience, introducing shared relationships with greater emphasis on reaching out to customers before they made contact. New roles separated inbound and outbound responsibilities, while operating in new regional groups rather than a 1-2-1 basis ensured customers always had a point of contact. Proactive contact increased 200% while inbound service levels also improved by 50%. “Do transformation when it is working well” “Inbound left no time for outbound”.

Evolution: engaging people to make further changes

A low score from the colleague engagement survey (GLINT) highlighted difficulties, including the lack of a personal customer relationship. “Hot Gossip” sessions with colleagues gave a means to understand concerns in more detail and listening to this feedback was crucial in shaping further changes. Roles were changed and CRMs are now responsible for all customer contact, with consistency delivered through 1-2-1 relationships. Customers benefit from quicker responses, with clarity of service channels and consistent service across all regions in the UK. A new business development (BDM) role was created and data scientists optimise customer opportunities across different market sectors. A 100% increase in opportunities guided sales colleagues to the right customers in a difficult market. Sales are tracked through a self-built CRM system and customer effort is recognised as part of the success of the sale function. “Right people reaching right customers” “Would have been easy to pull the plug” “Small changes that don’t feel huge”.

“Decisions made are closer to our customers.”

Lindsay Ruth,
CEO

“Corporate customers value the human touch. People trust us to deliver their promises to their customers.”

Emma Botfield,
Director of Customer Services Ops

“Inbound sales needs a strategy. Sales results aren’t immediate. It’s important to know who to contact and why.”

Jamie Gough,
Head of Sales & Service Effectiveness

“Creating a healthy challenge is not friction. People need support and guidance to improve. We feel more organised now.”

Louise Kirk,
Head of Internal Sales UK

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Planning and Insight: replacing sales myths with facts

Joining up Planning and Insight has been key in helping to improve sales opportunities and drive efficiencies. Workload was manually captured to gain visibility of the sales process, as well as its value, and validated in dashboards before being used to create staffing requirement forecasts and capacity plans. Forecasts were improved through understanding non-value activities from customer, colleague and business perspectives, then removing them from the sales process. The impact of change was modelled, enabling the number of sales colleagues to be reduced through natural attrition; crucially, savings were reinvested to create the new BDM roles. Data science works in tandem with human insight, giving improved opportunity predictions, better targeting of outbound contact and directing sales effort toward more lucrative market sectors. "Knowing who to contact and why is important" "I feel empowered to do my job".

Quality: supporting excellence in a sales team

The success of the new roles depended on supporting colleagues through and beyond the transition. Training in recognised sales and communication techniques was used to give skills and confidence, whilst a higher number of better quality performance reviews were included within the new monthly work schedules as a standard. Better daily structure improved customer access while colleagues could organise customer visits, proactive contact and other work or absences more effectively. This supportive culture delivered better results and job satisfaction. KPIs were introduced to focus on customer effort as well as sales outcomes; this meant doing the right thing was equally recognised and rewarded. What's more, the CRM system manages sales consistently, making previous individual methods redundant. "You have to take people through change at their pace" "The right balance of ownership and governance really works".

Joined up thinking transforms the end-to-end experience

Trusted planning principles have been adapted to provide improved forecasting and better understanding of the customer demand drivers critical to identifying effort required to realise opportunities in the chosen market sectors. Establishing the right level of resource opened up further investment opportunities and, as sales growth continues, capacity plans are central to the resourcing strategy as well as understanding colleague utilisation. The deployment of schedules using the WFM system provides a framework for colleagues on a daily basis for the first time. A new quality assurance framework was established, focussed on outcomes and behaviours. This is helping colleagues develop their sales skills, with additional coaching available when needed or requested. "Unavailability affects outbound first" "We are having better conversations and when customers want them".

"Quality scorecards have to keep evolving as you learn from them."

Daryl Bush,
Customer Experience Manager

"Engagement increases through challenge – for big and small customers."

Kudzai Manduvi,
National Account Manager – Education

"Understanding the effort makes the outcome more rewarding."

Josh Coyne,
BDM

"The UK business is on a journey, putting the customer at the heart of the decisions we take."

Pete Malpas,
Regional Vice President of Northern Europe

Results

- **Saved £410k with positive attrition (reinvested in BDM roles)**
- **5% increase in turnover in a challenging marketplace**
- **NPS & NES (effort) scores up 20 points from mid 50s**
- **3 fold increase in proactive outbound contact.**

"Simplify tasks to make them achievable. Ensure sales team are comfortable to disturb a customer."

Stuart Miller,
Head of Product Plus

"I feel empowered to do my job. I like the small changes that don't feel huge."

Claire Rodwell,
Client Relationship Manager

"Collaboration is most important, providing sales teams the best engagement tools."

Mark Bannister,
Director of Field Sales

"Outbound is a tough gig. People need Strength Ambition & Success (SAS)."

Tricia Reid,
Business Development Manager Lead

RS Components operates globally, offering half a million electronic & maintenance products from stock online and at RS Local Branches to over 1m customers annually in the UK. Internal Sales for UK are based in Corby. Systems used include Aspect WFM, with self-built CRM & quality score cards.

Visit www2.theforum.social/2020RSComponents for the full case study and video. We hope you enjoyed this summary

Speech analytics: quality and customer experience

See how successful implementation of analytics has transformed the contribution of Quality at Vitality, engaging colleagues and raising care scores up by a quarter, with a 13% drop in lapse rates.

Summary

A detailed view of customer experience is provided by 10 new scorecards, based on 100% sample, made possible by the successful automation of call scoring using CallMiner. This has already completed the equivalent of 20 years manual effort and audit fails are down 16%. A new governance process is developing the use of analytics in the business, with Quality, Coaching & Continuous Improvement coming together, in a value-add function, alongside planning. Programming of 260+ rules, based on over 750 key phrases, relied on the expertise of external consultants from Ember, who provide a managed service. In just 18 months this new Quality Framework, has been rolled out across four areas of the business, raising NPS by 8-18%, supporting a 4.5 Star rating on Trust Pilot and leading to being voted the best large centre and No.1 for voice contacts.

Vitality

Life's better with Vitality.

Key Initiatives

Automation enabled greater quality and insight

A quality product and great customer experience are important to Vitality. Yet understanding how well they delivered this still depended on manual methods of call monitoring, as in many contact centres, with just four calls per agent reviewed each month requiring a team of 26. With automation, all calls are now reviewed – a big step change that has driven huge consistency and improved understanding of customer needs. The costs are offset in the Quality Team, saving time and enabling quality reviews to focus on training needs and improvements in customer experience. What's more, the quality team is now an even more integral part of continuous improvement within the business. Speech has vastly increased their customer insight, enhancing the QA/Coaching roles, not removing.

Speech Analytics: delivering for Quality Management

Understanding the desired deliverables from Call Miner was critical to how it was implemented to review calls. Three pillars of quality were established: regulatory information, service excellence and process assurance. This focus means that Vitality can now score the most critical parts of calls. Engaging colleagues, to understand how customers and agents talk, has allowed the mapping of key words and key parts of conversations – scoring them against a standard agreed with the Operation. Colleagues identified and refined over 750 key phrases, whilst Ember's consultants built these into over 260 rules in the system. Engagement, across the business with the partners, enabled a development roadmap to be created. The proof of concept rolled out in Claims helped speed up the time to implement in Retention and the other areas of Customer Services. Vitality worked on the notion that if they could get this to work in their most complex call types it would work anywhere.

Measuring quality: a new view of what good looks like

Automation was the key step in moving from a small call quality sample size to total coverage. This, in turn, made possible the creation of the quality scorecards that moved the team away from a 'tick box exercise', in which contentious challenges were removed. Design of the ten new scorecards was based on 360+

"Q&A was a manual and time consuming process before coaching could commence, Finding calls to coach took a lot of time."

Simon Evans,
Performance Director

"Speech Analytics only does what you ask of it; understanding what you want is the first thing to get right and maintain."

Karen Firth,
Head of Retention

"Automation has freed up manager time to act upon the score rather than creating them, focussing on the outcome, not finding it and minimising the disputes over single call scores."

Tom Farmer,
Retentions Ops Manager

"I thought capturing a claim process with speech analytics would be impossible, but it wasn't."

Lauren Holmes,
Quality Consultant/Coach

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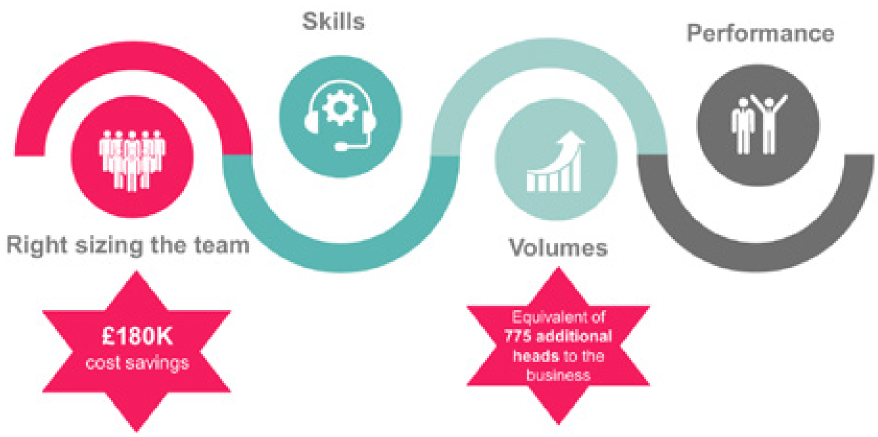
rules, grouped under the three pillars. With each component being scored, it's now possible to drill down to identify the exact area of need. This means agents can have next-day feedback and scores are monitored to confirm that improvement is sustained. As anticipated, scores were lower at the start, due to increased coverage and more demanding scoring. Agents can see how each call is scored, they can focus on the important parts quickly.

Greater insight drives greater change

Another key step has been improved insight into why customers call. To do this, key phrases were identified to look out for, and sequences of words in context. Although complex to programme initially in CallMiner, production of this insight was then automated which was a massive step. It was also important to remove agents' manual call logs and stand-alone phone numbers. The insight has been woven into call demand forecasts, improving accuracy and plans for agent skills. What's more the role of quality coaches now includes continuous improvement and analysis of call demand is used to validate the size of opportunities. The resulting changes led to external recognition and Vitality gained 1st for call service in the Top50 mystery shoppers awards in 2019. Lapse rates have improved by 13% per annum as renewals are now processed consistently across agents. Their biggest challenge was what they didn't know but the effort they invested is paying them back.

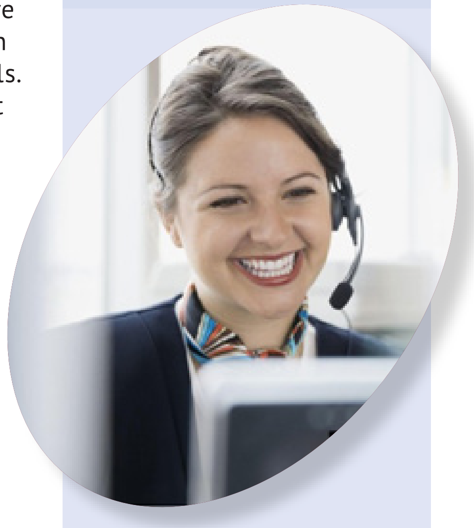
The managed service approach

An important ingredient of success was the relationship with Ember, who provide the specialist knowledge that made it possible for the system to be rolled out so quickly, with a proof of concept for claims in just six months, then extended to a further three areas within the year. Not only did they bring proven experience in programming the system, but also they were able to develop the use of metadata which underpinned mapping of the claims process. The testing strategy and review of rule performance also proved key to success. A new governance framework now supports a wider change strategy, with broader developments steered from the top of the business and many specific improvements made on a daily basis by the Quality Forums. Working together and setting the standard for speech analytics and winning the Vitality partnership award meant a huge amount to Ember.



Results

- **NPS scores rose by 8-18% after roll-out**
- **350k calls monitored to date**
- **Care scores up 24%**
- **4.5 star ranking on Trust Pilot (65% excellent)**
- **13% improvement in lapse rates**



"We brought in Ember to help us get under the bonnet, the cost/benefit case made perfect sense. Ember's expertise allowed Vitality to concentrate on the outcomes."

Vicki Franz,
Head of Quality & Efficiency

"Mapping the processes means customer demand analysis is way beyond what we had before."

Pete Devlin,
CI Analyst

Benefits can be seen through presenting the results in the new scorecards."

Andy Rothwell,
Ember Consultant

"Providing excellent customer service protects the Vitality brand, we need to invest in quality to be the most trusted provider. To be the best in breed you need to work with the best in breed."

Simon Evans,
Performance Director

VitalityHealth was established in 2014 and specialises in providing private medical insurance within the UK. Located in Stockport and Bournemouth with over 500 frontline agents. Systems used include CallMiner, Eureka Coach, Power BI & quality score cards.

Visit www2.theforum.social/2020Vitality for the full case study and video. We hope you enjoyed this summary

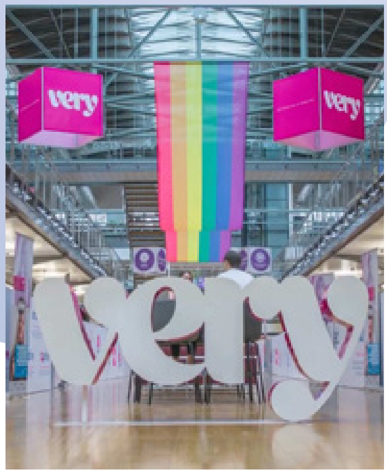
Customer Closeness Centre: releasing innovation

See how end-to-end customer journey improvements worth half a million pounds have been delivered within a year, driven by advisors in the model office, using agile transformation methods.

THE VERY GROUP

Summary

Located at The Very Group's HQ, the Customer Closeness Centre (CCC) combines model office principles with agile methodology to detect, explore and fix problems, applying a 'fail fast' approach to test solutions, before implementing across the contact centres. Here, a specially-supported team of 14 Customer Experience Experts, hand-picked to challenge the status quo, rotate fortnightly between two complementary roles. In the Customer Zone, they handle the digital retailer's calls/webchat at an exceptional performance level, share insight, and help model how the 'advisor of the future' might look. In the Agile Zone, a three-stage process goes from root cause through solution-build to implementation. In just 28 sprints, this approach has identified £2m+ in potential savings, driving £550k in benefits to date in areas including knowledge management and automation.



Key Initiatives

An innovation hub for customers

Innovation is vital for retail businesses facing unprecedented disruption, with £1 in every £5 now spent online. The Very Group aim at a customer experience for online shoppers that's 'recognised and loved' and a purpose-built incubator was established to both identify how customer experience can be improved and raise customer visibility across the headquarters. This Agile 'model office' was purpose built in The Very Group's Liverpool HQ to raise visibility of the customer within the organisation, and rapidly test new ideas for customer experience improvement. An innovative operating model was applied, with the customer experience experts (CEEs) in the CCC rotating fortnightly between two complementary work types. In the Agile Zone, a three-stage development cycle was initiated in which CEEs could focus on discrete projects, applying agile thinking to identify customer pain-points and explore root causes before devising, testing and supporting the implementation of scaled solutions. The Customer Zone receives specific types of contacts, so that CEEs working there can gather insight and test out new approaches, relevant to the work of the agile scrums. "We want to run at pace, hence the two-week sprints" "It's dynamic".

Modelling the advisor of the future

Selecting the right people has been critical to the CCC's success, with its 14 CEEs hand-picked for their innate curiosity, problem-solving, communication and service skills. This combination ensures they work across both role types, analysis, fix and collaboration, in the Agile Zone, and delivery of exemplary service, in the Customer Zone. Moreover, the blend sets a yardstick for the 'advisor of the future' and an aspirational benchmark for the wider contact centre estate. The team's Touchpoint Net Promoter Score (TNPS) is +60 and First Contact Resolution (FCR) is 77%. The team's impact is consolidated by their visible location, near the entrance to The Very Group's HQ , making it easy to collaborate, share insight and agree actions with in-house teams. The Agile Zone's fluid design also facilitates discussions, with standing desk-space and a micro-auditorium helping promote creative thinking. "We recruit carefully" "Our environment inspires energy" "Our physical design supports transformation".

"The CCC drove awesome business change through the people who matter most: our customers and our people."
Mark Billingham,
Group CX Director

"Our role is to innovate to deliver better service to our customers."
Suzanne Edmondson,
Head of Global Customer Operations

"A big part of what the CCC do is to bring the customers to life for people here in our headquarters."
Lucie Child,
Strategy Manager, Customer Care

"Collaboration is key; the way we come in and talk with people in the business."
Daryl Wilkes, Head of Transformation, Gobeyond Partners

"We learn new things every single day in the agile scrum. This is my dream job."
Nicola Politt, Scrum Master Team Manager in the CCC

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Agile scrums: a rhythm of two-week sprints

During agile sprints, CEEs are supported by Gobeyond Partners business and insight analysts, a scrum master and senior delivery manager to work on problem statements (stories). These come via multiple sources, including The Very Group's leadership and operational managers, speech and data analytics, Customer Zone insight, and ongoing Agile Zone supply and demand mapping. CEEs complete the latter manually, overlaying each map with prospective fixes before outputs are captured electronically using JIRA software. Sprint reviews are held fortnightly to discuss previous stories, actions, progress (testing and delivery) and blocks. These meetings are also used to prioritise ongoing and new stories for the next sprint, based on business need and benefits. The time and resource required to resolve each story is estimated here, but revisited during daily in-sprint dialogue. "Communication is vital" "We fail fast and adapt quickly" "It's an incubator for better customer experiences".

KEVIN: their knowledge management system

An early success in the centre was with the frontline knowledge base, which was over-populated and difficult to navigate. This was redesigned over successive sprints, with the CCC creating a portal for advisors to share queries, the content of which was analysed and mapped in the Agile Zone. Potential fixes were then tested in the Customer Zone, undergoing enhancement and re-testing prior to KEVIN's relaunch. The move, which saw CCC team members providing training onsite at all Webhelp-The Very Group contact centres, has reduced customer transfers by 10%, saving c.£0.3million annually. It has been further reinforced by the creation of a KEVIN team in South Africa, which liaises weekly with the CCC to ensure continuous improvement. "The original tool was a knowledge dump" "KEVIN is now fit for purpose" "It's reduced effort".

Driving change: chat-bots, bulky items & saving money

Savings opportunities worth £2m+ have been identified in just 28 sprints, with £550k realised to date, and £500k in the immediate pipeline. Examples of activities in the Customer Closeness Centre include:

- Testing a chatbot in the The Very Group app to reduce avoidable contact for specific queries.
- Working with The Very Group's logistics team to validate a systemic change in the 'bulky item' delivery process.
- Implementing process changes to reduce frontline reliance on secure webmail.

"We're innovating to improve customer outcomes" "We're not boiling the ocean" "We prioritise based on business and customer need".

"The CCC is an incubator for our agents of the future."

Trudie Everall, Senior Delivery Manager, Gobeyond Partners

"The opportunity for creating change was very attractive; that's why I wanted to join the team."

Dylan Sapsed,
Knowledge Analyst

"The work we did early on, with KEVIN, helped show what we were capable of in the CCC."

Eve Clark,
Team Manager in the CCC

"We operate in an agile environment; it evolves week-on-week and month-on-month. This is a fast business."

Daryl Wilkes,
Head of Transformation

"We take insight from our journey mapping and overlay it with actions."

Steph Slowik,
Customer Experience Expert

"Every sprint, we are improving and learning. I really feel like my mindset ... changing."

Alison Vaughan,
Customer Experience Expert

Results

- £550k benefit delivered in first year
- A further £500k pipeline of initiatives currently underway
- £2m+ in opportunities identified since inception
- Aspirational customer outcome metrics, at +60 TNPS and 77% FCR.

"We've worked with the CCC to see how our chatbot could be enhanced so there's a continual improvement loop."

Vicky Bolam,
Customer Care Delivery Manager,

"Where other teams look for an immediate fix, I'd liken it to a game of whack-a-mole. One problem knocked down can appear again down the journey. The CCC makes sure that doesn't happen."

Keith Joughin,
Senior Logistics Manager

"It's great working in the CCC; we have great fun and work hard as a team. It's an amazing and unique opportunity for everyone involved."

Lisa Robinson,
Customer Experience Expert

The Very Group is a digital retailer (formerly Shop Direct) with 4m customers supported by a multi-channel, multi-site service operation 1,200FTE, mostly operated by Webhelp in South Africa. Technologies include Aspect telephony & speech analytics, LivePerson for chat, and a chatbot developed in-house.

Visit www2.theforum.social/2020TheVeryGroup for the full case study and video. We hope you enjoyed this summary

Strategic Planning and Predictive Analytics

Find out who has been pioneering strategic planning and what best-in-class looks like. Apply the Strategy Pyramid, explore Target Typology and plan for life after COVID-19.

When people look at information that drives them to do something, they want more! The right metrics can bring your strategy to life and a clear target operating model or budget flows into benefits downstream in the planning cycle. How can you remove siloes and drive collaboration across the customer journey? Learn about predictive analysis, like forecasting but not just for planners, and the potential for analytics or machine learning tools in implementing strategy. Reflect on how we are planning for COVID-19, and how this could become a catalyst for rethinking our strategy and target operating model.

2020 Vision

Twenty years of our professional community

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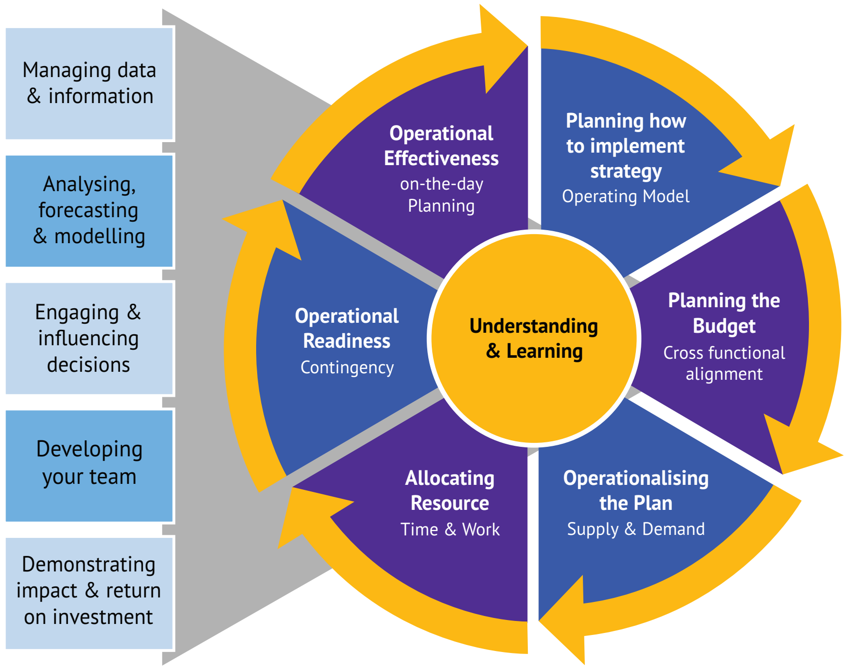
The Planning Cycle: implementing strategy & budget planning

A clear target operating model and budget flows into benefits downstream in the planning cycle. Learn what the best-in-class looks like and find out who has been pioneering strategic planning in our recent Standards Benchmarking Accreditations and the 2020 Innovation Awards.



A seat at the top table is key, so you are involved early, able to shape the strategy and support interactive evidence-based, data-led decision making with those who lead the business.

The Planning Cycle, our best practice framework at The Forum, is the basis for successful planning teams. In Standards Benchmarking, the best get better every year, by learning and sharing the latest thinking as best practice evolves. When we launched the new framework last year, Strategic and Budget Planning came to the fore, with the most pioneering teams actively raising their game and a more prominent place in the planning cycle. When the target operating model and budget is set up well, benefits flow downstream through the planning cycle. Key to this is regular & frequent review of variances to budget, forecasting predicted impacts ('predictive analysis'). Here, in the awards chapter and in our online videos, we can learn from some brilliant teams how they have put these ideas into practice.

Implementing strategy

A key step for resource planning teams is to be involved in the strategy process early, with a seat at the decision-making table, so you can help shape outcomes at this point, to avoid downstream problems. Just as important, you can understand strategic imperatives at any early stage and feed this through the planning cycle. The very best teams are driving the process, an integral part of the organisation's broader strategy, taking a collaborative approach to their work. Other support areas are partners in the process and the team look to involve them in all decisions.

Strategic planning is going to be complex in a large business, because of the many diverse drivers & functions. But, like others below, the planning team **LV=** (pg 26), stripped back their model so it's really quick and easy to use with stakeholders. This work to simplify and automate, with help from a dedicated data analyst, means that just two analysts can support strategic planning across the whole business. At **Sky** (pg 30), a strong commercial intellect coupled with a thirst for innovation has made the team pivotal to the success of the business. This team is helping to shape the future strategy of the business and run many concurrent change projects within planning. Focus has shifted away from tactical repairing to strategic planning, 12+ months out.

Best in class

The best-in-class teams in this area are often in demand; they are central players, never side-lined or circumvented. They are externally referenced, looking outside for inspiration and best practice. Flexible models blend mathematics, business intuition and wider knowledge – and these organisations actively look to the planning team to provide guidance and support. Such teams include **Cooperative Insurance**, with **Santander Operations** and **Cooperative Bank**, whose great innovation case studies in 2016 demonstrate their long-established expertise in this area. In our 2020 awards, **RSA** (pg 28), showed the value of building strategic resource models in the system used by Finance (Anaplan), 'baked in' to business reviews. Analysis can be turned around instantly or in hours, not weeks. It works so well because the key data is always there with one single model framework and robust governance. The team now has a key role in driving continuous improvement across the business. At **L&G** (pg 38), a collaboration between planning, business transformation and operations teams (the 'customer service triangle') in Group Protection has delivered powerful results that are changing perceptions of the business among key customers area.

Planning the budget

In budget planning, the best teams see conversations changing as more senior stakeholders engage, often in new ways. Teams simplify complex operating models, the budget process flows seamlessly into operation. For instance, at **RSA** (pg 28), the planning model is a key tool in company-wide budget planning, with frequent reviews in place. They turn around multiple budget scenarios at an astonishing speed and give visibility to the impacts of different resource drivers, at a remarkably detailed level. At **Yorkshire Ambulance Service** (pg 22), planning insight is now valued for emergency planning. Forecast accuracy was key to buy-in and planning for The Tour of Yorkshire was a turning point, consolidating their place at regular decision-making meetings. Planning is a key capability for YAS now, given impacts of the Covid-19 virus.

You need to be able to model the impact of many senarios rapidly and review budget assumptions continually, with stakeholders. Standardised, flexible models enable you to be relevant and credible.

and predicative analysis means people can act to resolve issues before something even happens. There are excellent handovers, data governance and change management ensuring a clear data journey and a smooth transition

Phil Anderson is Director and David Preece is Head of Programme Delivery at The Forum.

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The pyramid principle for strategic planning and removing siloes

The strategy pyramid can give direction and drive co-operation. Looking through four different lenses, you can align strategies to common goals, and connect metrics. See how this helps us map out what drives performance and predict the impact of changes and unforeseen events.

Whether you are in a planning, insight, quality, operational or leadership role, if your work doesn't align to the organisation's objectives, you set yourself up for trouble and, potentially, a lot of wasted effort. Our new best practice thinking in this area starts with the Strategy Pyramid, an evolution of our long-standing KPI Pyramid. Start at the top. What do you stand for as an organisation? Often this is laid out in a corporate purpose, vision and values, but how well this is worked down does vary a lot across our member organisations.

Work published in the Harvard Business Review (see box) is thought provoking, because a good brand strategy will make this easier to operationalise, starting with the customer in mind. Our brand and values should dictate the goals and expectations we set. What are your organisational objectives and brand strategy? How do they link in to what you do in your role?

Build a pyramid of strategies

You need high-level strategies that will deliver these goals, with clear measures of success. These may exist already, or they may need challenging and developing.

A very useful technique, which we teach in our Learning Academy, is the 'balanced scorecard' and there will be scorecards at each level. Starting from the top, create a dashboard (for instance) that looks at four key strategic areas. This balances factors that often can't be directly compared ('apples & pears') but are all necessary for achieving your corporate goal.

Four stakeholder lenses

We call these the lenses and four is often a good number. It gives diversity and it works well in a matrix or a 3-dimensional pyramid. Beware: don't just think about this when you are starting to build a dashboard; that is too late! In this example (see diagram), we look at success in terms of these **four lenses**: colleague, customer, business ('company') and compliance. How are we meeting the needs of these **stakeholder groups**? Do we need to manage expectations in some way? Create a strategy for each lens that considers the needs of these stakeholders in relation to the rest. Otherwise they just compete, a potential weakness in balanced scorecards. For instance, members often talk about conflict at an operational level between reducing costs and engaging colleagues, or customer satisfaction. Your overarching objectives should give this balance between the lenses. Your culture and how you use the measures for performance management is also extremely important (see the following pages).

Workforce & customer strategies

Be sure strategies are both holistic and realistic, with buy-in from corporate functions, like finance, sales, marketing & HR, as well as operations. For instance, resource planning teams require a clear **workforce strategy** that looks at the needs of colleagues in a way that can prevent operational conflict, as mentioned. The **customer strategy**, thankfully now more common,

Brand Strategy: what do we stand for?

Denise Lee Yohn identified nine types of corporate brand, in her book FUSION: How Integrating Brand and Culture Powers the World's Greatest Companies. Published in the Harvard Business Review, December 2019.

- **Disruptive** challenges the market
- **Conscious** on a mission to make a social or environmental impact
- **Service** delivers high quality customer care
- **Innovative** introduces breakthrough products and technologies
- **Value** offers low prices
- **Performance** product or services that deliver a superior performance
- **Luxury** higher quality at a higher price
- **Style** differentiated by look and feel
- **Experience** differentiated by the experience offered

Best Practice Guide © Professional Forums Ltd 2020

needs to spell out what is expected of colleagues (in order to deliver for customers), and what can be afforded (by the business). The right lenses will vary by organisation or sectors. For instance, you may need a strategy for the environment or the local community – or to distinguish clients (who pay) from end customers (who benefit).
Why does this matter? Because a profitable business or a low-cost service does not always mean happy customers or colleagues or regulators – and vice versa. The balance is key to success.

Performance measures

When setting indicators, the pyramid principle is key. For each lens, you need a measure of success that you can track. These are the Key Performance Indicators (KPIs). High-level strategies focus on what we are setting out to achieve. You will also need enabling **delivery strategies** that detail the how. Each will have its own success measure(s), also called Performance Indicators but not strictly KPIs. Working with a hierarchy in this way means you can aim for just four KPIs, one for each lens.

In 1956, psychologist George A Miller proposed a theory that our working memory can hold just seven things. This is the memory we use when processing information. More recent studies put this figure as low as three or four. If we limit the number of metrics, at each level of a hierarchy, it means we can process this information better. When developing delivery strategies, it can be helpful to add layers, breaking into stages or journeys for each lens. Map it out one stage at a time and beware of creating siloes, for instance by setting strategies at a departmental level. So, express a customer journey in terms of their experience not your departments.

For compliance, start by mapping the regulators you need to satisfy. Remember each strategy needs a measure of success and each must link back to the next level above. You can add layers as you need, to keep your scorecard simple for users at each level and help them process the information. To avoid siloes, a balanced scorecard at the departmental or team level will typically draw on a mix of lenses.

Input measures

The final layers are our input measures. Here it is important to distinguish measures that are inputs (what happens) from outputs (the consequences that result). Also establish which factors **we can influence**, and which are **outside our control**. Inputs are things that need to happen (or not happen) to deliver successfully on your output performance indicators – for instance behaviour or processes that drive productivity or external events. It is especially important for planners and analysts to build understanding among stakeholders of the **operational levers** you can pull or the **operational impacts** to watch for. For instance, handling time or productivity and most shrinkages are operational measures that we need to manage. On the other hand, weather patterns – or, of course, a virus – are factors that we can't control, but absolutely need to understand and forecast. It's also vital to model and predict the impact of these on other input or output metrics.
For instance, we can use trigger points for any of our input measures to define when we start to implement our playbook of operational contingencies. This can, clearly, be used at any stage of the planning cycle, from strategy and budgets right through to on-the-day operational effectiveness. Planning for the unexpected is something we have all been getting much more experienced at these last few years! If you have a robust hierarchy of strategies and indicators that everyone buys into, from top to bottom, then you will find yourself much more agile and joined-up as an organisation. Learn more from our virtual learning modules. Why not try our Strategic Analyst Box Set?

Ian Robertson is Insight Specialist and Phil Anderson Director at The Forum.

How can choosing the right metrics bring your strategy to life?

Do we present people with more information than they can realistically act upon? It could be insightful, but insight without action delivers no value. What happens, instead, if people look at information and immediately do something with it? They love it and want more!

There is a responsibility on all of us here – the planner, business leader, quality coach or team manager as much as the MI Analyst. Imagine yourself as an MI chef. You could create a buffet, putting out lots of dishes and letting people choose what they want. Yet this creates waste and a buffet rarely contains the best, because you don't have time. By contrast, top chefs focus on selecting a few carefully balanced ingredients to create something special and memorable. Yes, there is still a place for the tasting menu, when you want to experiment, for the right audience. Otherwise, carefully select and refine the information you share, so that your creation drives the very best results and action.

Align metrics to strategy

Do all metrics have a clearly understood purpose and support a strategy? Review what you produce, using the strategy pyramid (on the previous page). By creating the strategy framework, linking performance and operational measures to it, you can be sure you have **the right information** in your dashboards, with a clear structure. Putting the KPIs at the top level gives a balanced scorecard. We can then drill down into the metrics that link to the supporting delivery strategies.

Track and measure the inputs

For each strategy, think what needs to happen. What could block this? Find out how to track this. What do you measure? How do you find the data? Next, consider if this is something you can track or control – **operational measures** that need to be managed. For factors outside our control, **external measures** can be used to predict and plan for the impacts (consequences). This makes the data relevant and most likely to drive appropriate action. Not all measures will be part of a performance dashboard, but planners, analysts and other teams can use this information for their commentary.

Focus on your audience

As an end user, reports are far easier to use if they only show me the information for the work I am involved in and can influence. So, use the pyramid to map the key stakeholders for each strategy. Understand who owns this strategy and who delivers things that feed into it. If we filter and refine our reports or create personalised views of a master report, we can focus our audience on just the information they need. Let people drill down to see individual trees but show them the wood first and paint a few pictures of things you know will really excite them!

Focus on the outcome

Finally, work back from the outcome. What do we expect to happen? What are the consequences of variance in any particular measure – if it goes above or below a particular trigger point for instance. Are certain success measures put at risk? Is this a key step towards success in one particular area? Is this a significant change from previous weeks (or months)? Data becomes meaningful when we can show why it matters and what you need to do about it.

Be clear what each metric exists for

There is rarely a single dictionary of metrics in our organisations, so it's far too easy to end up with conflicting versions of the truth. We need to take time to agree and document these in an easy-to-use manner.

- **Name.** Unique unambiguous, compelling and easily understood
- **Purpose.** What strategy is this supporting? And the benefits of this?
- **Target.** What's the desired outcome? Inc time & target type
- **Ownership.** Who owns producing this? Who takes action? What?
- **Calculation.** Show formula & sources of data. Explain anything that is potentially complicated or confusing. How and when is this produced?
- **Risks & controls.** How could this be misused or misunderstood? If we focus on this in isolation what is going to give? What other measures are needed to balance this?

Join us in our Learning Academy to learn more about effective ways of setting success measures and targets for your business or your team.

Target Typology: how are your measures & targets understood?

Are your key metrics understood? What behaviours are your targets driving? Learn about different types of targets and the misconceptions that surround them. Why not look afresh at what happens today in your organisation and how you might move forward?

The most frustrating part in dealing with targets is that they are often misunderstood. Ask someone what constitutes good performance against a particular target. You are likely to get either several conflicting responses or an explanation that misses the point of the target or even promotes negative behaviour instead.

Types of Target

Best practice means being aware of all the key metrics in use; make sure there is a clear, shared definition and one version of the truth. Then define what good looks like and what variances need calling out. For instance, when someone talks about a 90/24 service level for emails, we know that it means 90% of emails to be answered within 24 hours. But what constitutes good performance? Are we saying that the aim is to hit EXACTLY 90%? Is achieving 92% better or worse? What do we do if we achieve 88%? Do we hold inquests into where the 2% was lost or do we consider it to be close enough?

Target vs Tolerance

Targets are often mistaken for tolerances and this creates confusion. Setting an Adherence target of x% drives the wrong behaviour if considered a target. Do we REALLY want agents to be non-adherent for 10% of their day if they could achieve more? Do we REALLY want agents to sacrifice customer experience to achieve 100%? We are actually working with a 'tolerance' or allowance, based on AHT, customer experience and other factors. The same can be said for sickness – a target of 5% can be construed as an opportunity to have 5% sickness. We could be driving advisors with no sickness all year into using their 'sickness allowance'. In truth, we allow a tolerance of 5%, rather than setting a target.

Stretch targets

We also see aspirational targets, meant to help people to push beyond current boundaries. Every step towards these is a gain. The problem comes if it's seen as a failure to not achieve these; people will become demotivated. Make sure that any targets you set are achievable; success builds belief and can lead to further success.

Watch for bad habits!

Here's another type of target we hear about. Someone may say they use an 80/20 service level, 'because this is an industry standard'. In fact, this is an 'industry habit' and targets should never be standard, since organisations and departments are so different. For instance, the standard for emergency 999 calls will be higher. It may be different for sales or service or transferred calls. Watch your customers' expectations, understand the needs of your organisation and customers and set the right target or tolerance accordingly. Don't let customer service be compromised in order to deliver a target that isn't fit for purpose.

Unintended consequences

We can also set targets by accident. For example, an organisation may believe it doesn't target average handle time (AHT), but advisors think they do! Perhaps AHT is built into dashboards, often with league tables, then managers are challenged on productivity and pass this on. If people aren't clear about how to use metrics appropriately then targeting can be introduced through the back door. All metrics needs to be defined and what happens if we do not reach them (or if we exceed them) needs to be explored and mutually understood. Take a moment to reflect. What target types do you have in your business? What behaviours or outcomes are these driving?

Learn more about target types with our virtual learning box set: www2.theforum.social/2020TargetTypology

Ian Robertson is Insight Specialist and David Preece is Head of Programme Delivery at The Forum.

Where appropriate, these measures and targets can be used to benchmark.

Target types

Yes/No or Pass/Fail
Like the bar in high jump, we either clear it or we don't.

Zero Tolerance
Some things are unacceptable. We take action on each incident.

As close as you can
Like the bullseye in archery, get as close as you can, to score high.

As far as you can
Like the long jump, the further you go the better.

How can predictive analysis be powered by analytics & AI?

See how combining the skills of forecasters & analysts can unlock potential in your organisation and your career. Predictive analysis is like forecasting, but not just for planners, and, if you have access to joined up data, analytics or machine learning are powerful tools.

How can we answer 'what if' questions and, at the same time, embrace the automation that opens up huge data sources with analytics or machine learning? When we see things more clearly, we can help shape the future. This now requires the skills of both forecaster and data scientist.

Predictive Analysis

Predictive analysis is like forecasting, but not just for planners. Firstly, we now require more depth of analysis, clear to see if we look back over past years. To sufficiently understand variances in this world of rapid change, and model the impacts of these, we also want to tap into vastly more data, of different kinds. There are complex operating models and data relationships to map. Planning models are no longer simple smoothing forecasts.

Secondly, we are losing our dependence on complex spreadsheets that can only be changed by their creators. Now, models are more like computer programmes, built with rule-based languages, with structured, automated data feeds and the governance that comes with this approach. At **RSA**, for instance, the models in **Anaplan** are programmed by planning analysts using iterative development and agile sprints. Scrum teams involve subject experts from across the business. Once set up, multiple scenarios can be managed with astonishing speed. Data is trusted, coming from a shared source with Finance, HR & others. Budget planning cycles are often an organisation's only truly cross-functional alignment.

Thirdly, we want to tackle problems before they happen, by creating forward-thinking performance indicators and dashboards. Forecasts are in-built, the result of joining up your drivers. Think: if X occurs, then this is the impact on Y or Z. We want to predict revenue, costs, customer and employee satisfaction. It's all about risk and downstream consequences. In theory, with the right data and resources, we can produce predictions for any of our metrics. Crucially, this work is likely to be replicated across the operation, so pool resources and don't work in siloes. You need analytical, programming & planning skill, with business understanding, but these can come from collaboration across any mix of teams.

Predicting weather impacts

Weather is a good example, as many operations face impacts from extreme weather events. Moreover, a wealth of publicly available source data can be used to build models that predict the impacts in our specific operational scenario. At **LV=**, for instance, the new, connected planning system for Home Claims is a sector first. Developed with **Guy Carpenter** and their re-assurer, this is transforming surge response to major storms. Projections from forecasting agency **EuroTempest** are overlaid on a map of UK home insurance customers and a model predicts surge impacts, to evaluate resourcing contingencies. Data drives the decisions. "You see what's waiting to happen, before it happens, and we can quickly model multiple scenarios". At **Anglian Water** the value of their weather impact analysis from their data science team, during the Beast

Five questions to ask about an analytical model

To predict the future, using data from the past, we need to gather the right data and create the right type of model. Be careful of assumptions, especially if you stray from well-trodden ground. To know if you have the right bases covered, why not try out these key questions?

1. What can you tell me about the source of the data you use?
2. Is the sample data representative of the population?
3. Are there any outliers in your data? How did they affect results?
4. What assumptions lie behind your analysis? (Keep asking)
5. Are there any conditions that would make these assumptions invalid?

This is drawn from The Predictive Analytics Primer by Thomas Davenport published by the *Harvard Business* Review Sep 2014.

from the East in 2018, raised their profile massively in the business. In planning, the team are using AI & machine learning forecasts, developed with their analytics partner **CACI**.

Data: the key to analytics

If you have joined up data, analytics or machine learning are powerful tools. They are like any predictive analysis, but able to process large volumes of data, automatically and at speed, trying many models to find the best fit. In customer operations, you want data for the whole end-to-end journey, with no gaps, and data tags that link it up. Even better, use metadata that can link to wider public data sources: age, gender, postcode etc. Statistical methods like regression are common, testing a hypothesis that independent variables are correlated. When you find the right combination, you can build a predictive model. Also, you may think of data science and speech or text analytics as tools for root cause analysis, just working on a large scale in an automated way. Analytics is not limited to strategic planning. At **Jet2** real time analytics, from **QStory**, analyses all key performance drivers, to explain the underlying reasons if an SLA is missed. Remember, any statistical analysis is based on historical correlation, yet the relationship between variables can change. So, it's important to fully understand the assumptions built into your model (see box). Risks need to be understood and governed, as models can soon be outdated if assumptions start to change.

What is machine learning?

AI, Machine Learning & Analytics all use complex algorithms to programme a model(s). You may ask: does my problem require machine learning? If so, take time to study some of the distinctions and features; there's been an explosion of innovation in recent years. For instance, not all AI is machine learning and analytics is powerful if you know how to set up the model. With machine learning, computers re-programme themselves, learning from external inputs, so they get better and better at key tasks over time. At **Openreach** (pg 40) Network Analytics uses decision trees, a type of machine learning often seen in medical imaging. Local engineers had known of, and been frustrated by, high volumes of unnecessary work, so the team worked with them to find cases where this could be removed. Automated algorithms were created to identify these in the data and change the work allocation rules accordingly. More broadly, supervised learning can be via classification (labelling data) or via regression (as above). Neural networks are another common method, with 'deep learning' a layering of these.

Paul Smedley, Founder & Chair at The Forum.
Ian Robertson, Insight Specialist at The Forum.

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Strategic planning and predictive analysis

COVID-19: learning how to plan for the unexpected

If ever there was a time for good planning, this is it. This pandemic has been without doubt 'disruptive'. Not only do we need to respond 'in the moment', but it can also be a positive catalyst for rethinking our operating model and strategic objectives.

It's during challenging times that our preparation is put to the test. We can avoid classic mistakes by drawing on experience across the professional network (crystallised knowledge) while remaining inventive (fluid thinking). Of course, there is a cost to being prepared for extremes. How do you choose to pay for this? In advance, with an expandable operating model and the cost built in? Or afterwards, taking the risk and hitting costs when it does happen?

The unknown unknowns

This was a type of disruption not seen before. So, when did this move from being un-forecast to being planned for? That's a critical judgement, with different answers in different places. Try charting the phases, so that in future we can draw learning. First, there was an awkward time, when 'all we could do was wait'. Notice that different countries and organisations did different things here. Then, within days we went from almost normal movement to social distancing and schools closing. Those with homeworking capability had the advantage. Technology played a key role. Many were now playing catch-up. Then there was a period where it was no longer new, but no-one knew how long it would last. This itself can be broken down into stages. At each point how did we plan? What did we communicate?

Creating Certainty

It is easy to become overwhelmed with the uncertainty. We turn the tide when we see that, at each phase, we move forward to a new 'business as usual'. We can play a part in shaping and delivering that. Business objectives will change, with an updated budget plan. What is expected of individuals will change too and the operating model at each stage may require changes in operating hours, contact channels, priorities by contact type etc. Moreover, in the end, we won't just return to how things were, but a new normal shaped by the changes we make along the way. This acceptance is part of feeling more 'in control'. There is an opportunity to adapt new approaches to resourcing and scheduling, but stamp any changes as temporary, with a clear start and review date. There will be changes in how we manage, with shifts, time out, breaks, 1:1s and team meeting. Try to stay focussed on objectives, however much these are changed. While you may compare against the original plan to analyse variance, it is most important to track and report against new measures. This is also part of feeling 'in control'.

You're not on your own

During unprecedented moments like this, it is important to remember you're not on your own. The Forum is your safe environment to share ideas, use as a sounding board and support you through testing times. One piece of advice from each of our Planning for COVID-19 series is to track, tag and observe your data. Capture as much as you can, with useful tags and timelines, so this time next year you can look back, without any bias, and really capture the learning.

Phil Anderson, Director & Alison Conaghan, Planning Specialist at The Forum. Contact them at: advice@theforum.social

Five top tips for operations and planning teams

1. Broadcast updates at regular intervals. Tell people when to expect changes. You don't need all the answers now. Use holding messages, web updates, apps, text or even email.
2. Reset key objectives. So, change reports if they're not fit for purpose. Focus against the new expectations.
3. Introduce flexibility options. Test and learn, but state clearly that these are a trial, not permanent, and set a review date.
4. Trust your people (often at home). Support them, ask what helps. Capture feedback now, so that you can learn later.
5. Don't talk about "going back to business as usual". You are only going forward. Even when things are more stable, it will be just another new way of working.

Digital Transformation and Data-led Decisions

The data-driven world is always on, tracking, listening, watching and learning. Data matters, because this is how we grow opportunities, develop and deliver commercially.

Read about emerging trends and analytics maturity. How do we seize this opportunity? What does this mean for analysts and business leaders? What can we learn from what other organisations are doing? Gain insight about how we create a great online journey for customers, with web or app chat and bots. Explore the new best practice framework for data, analytics & insight, with hypothesis testing and the scientific method at its heart. Consider which skills help the modern analyst stand out and how we future-proof our careers. Where do we need the personal touch? How do we optimise the use of automation?

See more articles on the Digital & OmniChannel topic on our member portal: www2.theforum.social/2020DigitalOmnichannel

2020 Vision

Twenty years of our professional community

The Forum
Raising Standards in Customer Operations

Digital challenge: why do data-driven organisations perform better?

Data matters, because it's helping us grow new opportunities, offer new services and drive huge efficiency. So, what does this mean for analysts and business leaders? How do we seize this opportunity for our organisation? Read about the emerging trends and learn from great case studies.

Research (see box) shows how organisations that perform best financially are also ahead on data usage. Technology transformation provides data in ways that were impossible, even unforeseen, not long ago. When combined with business strategies that focus on customer engagement, this is massively greater in significance as we look forward, compared to 20 years ago when The Forum launched. Organisations such as Google, Facebook or Amazon are iconic, pioneering both in technical approach and culture.

Digital transformation can put the customer at the heart of what we do. Data can join up an organisation, it's not just about the contact centre or a single department, and all kinds of enterprise are impacted. Take government or outsourcing, where service can drive the commercials. Or the 'servitisation' of manufacturing and IT, historically product-focussed or process-obsessed. Look at retail, at business-to-business – and the COVID-19 crisis is accelerating changes in behaviour too. You can't compete fast enough in today's world without joining up your data and effective business leaders understand this.

Data-driven decisions

Digital transformation is driven by technology that provides data ('digital'). Video, photos and voice are all searchable data. Machines can send us information about usage patterns and what is going on in or around us. They can alert us to issues that need action. Try searching the **internet of things** (IOT). Customers and colleagues can access all kinds of new information from mobile, smart devices and digital media. Field and branch operations can track everything people do. So, expect data to drive change in all departments, as it did in contact centres 20+ years ago. How will our siloed organisations be joined up as our work focusses on the end-to-end journey for customers? Data powers these changes. Data matters!

What does this mean for us and our operations? In the 2020 Awards, digital transformation runs across every kind of activity. We join up processes to manage them digitally, as in the **L&G Back Office** (pg 18). We transform the online journey for customers, as at **Clarks Shoes** (pg 36) and **AA Ireland** (pg 34) with chatbots & social. We join up data in our planning models, using operational or external inputs to predict customer and financial outcomes, as we have seen in **RSA** (pg 28) or **LV=** (pg 26). A capacity model proved transformational at **Yorkshire Ambulance** (pg 22) and we've seen the power of modelling in response to the Covid-19 crisis. Predictive analysis helps us focus on what we can influence or control and identifies gaps or disconnects, so that we can then prioritise the things that matter most.

Gartner's maturity model

The potential impact for our work as analysts or managers is huge, as Gartner demonstrates (see graph). Looking back over 20 years, much of our analysis was 'after the fact', looking back to see what happened. If we used this for diagnostic insight, such as root cause analysis, we considered it advanced and, too often, this was for internal management purposes. Today, however, we don't just look at what happened (descriptive)

Data-driven organisations perform better

- In 2019, research by Enterprise Strategy Group showed that data pioneer companies added 5% to revenues and cut almost 5% from costs. 93% say they make faster decisions than competitors. 60% far outstripped their customer retention goals (97% met their target).
- This backs up a 2012 Economist survey, which showed that 63% of companies who were ahead financially were also ahead on the way they used data.
- In the global ESG survey, 11% were data pioneers (21% in the technology sector), with low levels of dark data (stored but not utilised) and higher IT spend on solutions that investigate and act on data.

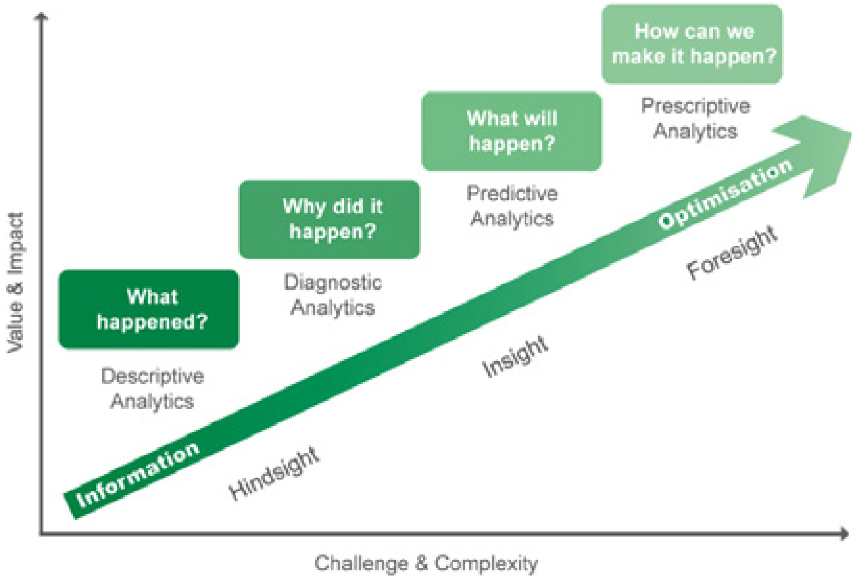
and why it happened (diagnostic). Increasingly, the best teams analyse what will happen (predictive) and take automated action (prescriptive). Furthermore, this goes beyond internal management usage, with direct impact on customer experience and business development.

If data is well connected, with data tags and good data dictionaries, it's ideal for use in analytics or machine learning. At **Openreach** (pg 40), they search a vast database to trigger actions that optimise the work schedule and remove non-value activity, all automated. Moreover, data preparation and visualisation tools can automate dashboards and exception reports as at **Legal & General** (pg38) and, with speech analytics for Quality Management, at **Vitality Health** (pg44). Data automation and visualisation is gaining traction in our professional community as part of this movement and our PowerBi (virtual) networking group is set to be one of our most popular.

Start simple, think big

It can be easier to see the journey when you look back, as members do in entering our awards, and it's instructive to look at past winners. **ADT**, in 2017-18, showed how a small amount of data can kick off major changes. The operation saved £1.9m in overtime, with 35% fewer service complaints. Data alone doesn't drive this. Culture, dashboards and a demand-led resource model linked this to a wider service strategy. Since then, the challenge has been to scale **insight capacity** rapidly, as their value was recognised and requests flood in. Scale requires a different kind of data structure and analyst capacity. Likewise, the cross-company network of insight at **Anglian Water** (2018) demonstrates the power of joining up analysts to develop new fresh thinking and new approaches. And at **Capita Innovations** and **The Times**, the

The Gartner Analytics Maturity Model



continuing journey of the insight/intelligence teams can inspire us, as much as their original award-winning work.

Above all, our approach to change is crucial and it's wholly different now, to the way we worked back in 2000. Build early successes, which can be high-impact with demonstrable benefits. Use continuous improvement to develop further with agile methods – such as 'sprints' and 'scrums' – rather than traditional programme management. We've seen that at **RSA** in the planning team (pg 28) and at **The Very Group** (pg 46), where a hand-picked group of advisors alternate between contact handling and agile process improvement. Why not consider everything we do as digital transformation, to be evolved in rapid stages with brilliant engagement? Data-driven decisions are so different in scale and scope now, compared to how they were looking back. Collecting data and performing analytics used to be prohibitively expensive, reserved for high-end businesses or programmes. Now cloud-based solutions make AI scalable and affordable. Bots can increasingly automate any routine, high-volume tasks, even in the planning team as at **Sky** (pg30). You can join up legacy systems and manage workflow. Auto-suggestion is familiar from Amazon or Google and increasingly planned in customer operations too. Think big!

Paul Smedley, Founder & Chair at The Forum. Contact him at: paul@theforum.social

Digital Transformation: consolidating data in the cloud

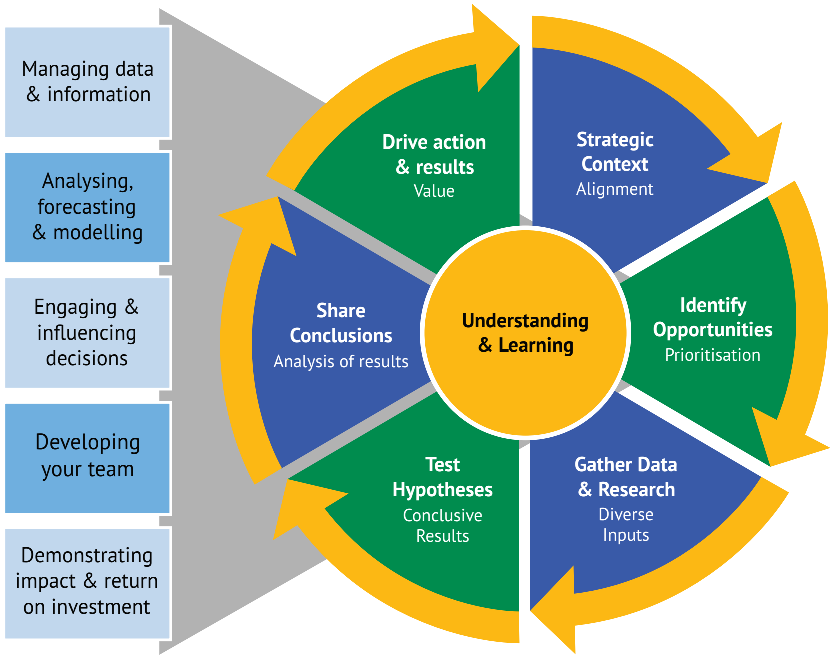
The data-driven world is always on, tracking, monitoring, listening and watching, because it will be always learning. IDC categorise devices as designed for entertainment, other imaging, voice or 'productivity', from PCs to supercomputers and metadata

- Digital Transformation integrates intelligent data into everything we do. What seems random will be bound into patterns of normality, by sophisticated AI algorithms.
- This will deliver the future in new ways, personalised and automated.
- Digital content is created in the core (cloud/datacentres), the edge (enterprise infrastructure) and endpoints (devices: PCs, mobiles & IoT).
- By next year, data in the public cloud will be more than in traditional data centres. By 2024 data in the core will be double that in endpoints, totally reversing the dynamic in 2015.

The IDC Datasphere report 2018 was sponsored by Seagate

The Insight Cycle: how do we release the potential from data?

Our new best practice framework for data, analytics & insight has the scientific method at its heart and draws inspiration from methods that drove success with the planning framework last year.



Data scientists or not, any analyst can learn from scientists. Essentially, we are experimenting with data and we can apply the same level of scientific rigour when we want to demonstrate conclusively that something is proven or disproven. Our new best practice framework for data, analytics & insight has this scientific method at its heart, alongside inspiration from the success of the new planning framework launched last year.

The Scientific Method

The Scientific Method is about proof (see below). It is based on testing hypotheses, which is important, because random experimentation wastes time and the results are not conclusive. In fact, for any analysis, we can structure our approach as an experiment. This may be a real experiment, running a pilot to test a hypothesis for instance. It may be a theoretical experiment, making use of existing data to test a hypothesis. We do this when building predictive models (eg forecasting). In this way, we can draw robust conclusions. Equally, remember that our work isn't purely academic. As insight teams we need to deliver value to those who fund us and, in practice, proof isn't always needed to convince or validate. However, be clear that the organisation is prepared to take that risk, if you are making decisions in other ways, and be prepared to challenge. It is easy for bias to creep into decision making (see our next article).

1. Gain strategic alignment

When setting out on any journey, it's important to know your destination. Take time to understand your organisation's strategies and goals (see the Strategy Pyramid pg 52). Ensure you have appropriate metrics that will track progress and success (pg 54) and make the MI easy to access. Equally, know your starting point, by taking time to baseline these metrics before you start.

2. Identify opportunities

Whenever there is a gap, between our current position and our goal, there is an opportunity. Gather ideas to deliver against these opportunities. Techniques like control charts can pinpoint outliers (see **LV=** pg 26). We can be reactive (taking ideas from others) or proactive (analysing ourselves or with gut instinct). The best teams will work on a good mix of all of these.

3. Gather data & research

Gut instinct is valuable, as our subconscious analysis builds on years of experience, but this can be influenced by myth and emotion, distorting reality. Even analysis can be subject to data bias or interpretation. So, gather data and not just numerical data. Anecdotal information can be used to give context to numbers, for instance. Research internally and externally, to see how others have faced similar situations – or find new sources of information. Every opportunity is different, so copying what others do will not always lead to the same results. Rather, learn from and adapt ideas and be open to new ways of thinking.

4. Test a hypothesis

Before implementing any solution, take time to understand if it will work. In many cases we may be looking to replicate a behaviour or process that is already successful in one area, in which case you can compare outcomes based on existing data. If you are trying something new, then running a small-scale pilot is advisable, comparing the results against a control group. Whichever approach you use, gather enough data to have statistical confidence in the outcomes. Modules on this are proving popular in our **Learning Academy**, for insight and planning analysts alike. When you create a hypothesis, be clear what you are testing and what outcome is significant. By doing X, we will see an improvement of Y% in metric Z, compared to our control group.

5. Share conclusions

We need to analyse the results of our testing to draw conclusions, and then disseminate conclusions. Are our hypotheses confirmed? What benefits or risks did we see through testing? What would we expect to see in a full-scale implementation? What are our recommendations? Then share this information with key stakeholders, in a clear and simple way. A key step in progressing to the next step of the insight cycle is effective communication of recommendations with our stakeholders.

6. Drive action & results

The success of any function is determined by the outcomes that they deliver or enable. For an insight function to be successful it is important that our recommendations are acted upon and the resulting benefits tracked, shared and success celebrated. Our recommendations may lead to new strategies and our successes may lead to updating our goals to build on these successes starting the next revolution of the cycle.

So, what drives success?

At the heart of everything is understanding and learning, in the centre of the cycle. Alongside this, five key activities drive succes. Insight is about learning and we need to embrace this. What we learn at each step could help us revise earlier decisions. Continually review, update and improve.

Ian Robertson, Insight Specialist at The Forum. Contact him at: ian.robertson@theforum.social

The Scientific Method

1. Question. Start with the question we want to answer for example "what will happen if..."
2. Hypothesis. Turn this question into a hypothesis which we can test, such as "this will happen when..."
3. Experiment. Conduct an experiment to test this hypothesis
4. Observe and record. Gather the data and results from our experiments
5. Analyse. Analyse the results of the experiment; was the hypothesis proved or disproved.
6. Share results. Share the conclusions of our experiments which often raise new questions leading to further experiments.

The Essential Drivers of Success

The best practice framework identifies five key activities. Our Learning Academy offers online bite-sized learning modules in most of these areas and many insight analysts are taking advantage of these.

1. Managing data

Sourcing, defining, documenting data underpins everything we do as analysts. Are we opening up self-service in an appropriate way, eg. with PowerBi dashboards? Are we tagging data in a way that joins up information across systems, channels and journeys? Is it easy for people to see what information is available and how this should be used?

2. Analysis & modelling

Analysis forms part of each stage of the insight cycle, disseminating and driving value (engaging others in this) and defining opportunities in a way that links to strategy and existing research. Are we modelling data in a way that helps create predictive metrics, impact assessment and interactive what-if analysis? (See pg 56).

3. Engaging & influencing

Communication and stakeholder engagement are vital at all stages. Insight teams can deliver very little in isolation and in most cases, we are enabling others to deliver benefits. How do you get people bought in – and having the right context to understand the relevance of data?

4. Developing the team

We need to develop a range of skills to deliver insight (see our next article). As it is rare for a single analyst to excel at all of these, we often need to work together as a team. So, understand the role each of you can play, and how it comes together. Focus team development to plug any gaps.

5. Impact & value

We all need to deliver value to our organisations. So, when you deliver insight, track and share the benefits that this enables. Relate these to your strategy pyramid (pg 52) and balanced scorecard.

2020 Vision: what skills help the modern analyst stand out clearly?

The role of an Insight Analyst has evolved significantly over the last 20 years. Simply being good at Excel is no longer enough. So, take a look at the seven top skills we see developing among successful analysts, setting them up to produce great insight for the next 20 years.

In this ever-changing and demanding world, how can we develop ourselves to be in demand, not just now, but in the future? Visiting our members, I get a unique insight into the ways in which the data teams, analysts and insight specialists interact and operate, across all types of organisation and team. From this experience I've identified some key skills and characteristics of effective analysts. With more and more data available, and an ever-growing expectation to use this information the role of Data, Analytics and Insight analysts has never been more exciting.

1. Questioning skills

Asking powerful questions is a key skill for any business leader, for analysts this is about asking inquisitive questions to understand, learn and identify the root cause of the need for analysis. Too often analysts can be at the wrong end of questions and requests, asking good questions helps us to develop our own understanding and that of others. Asking open questions starting Where? What? Who? Why? When? How?, can help not just in understanding your stakeholders but in analysing your data.

2. Self-evaluation

How do you know you're doing a good job? How do you know a change initiative has worked? Setting the right metrics to evaluate prediction and performance is critical. Targets are often mis-understood as not enough time is spent on the communication of the metric, versus the updates and the alerts.

3. Statistical significance

Just because it has happened once, doesn't mean it will happen again. You need to help people distinguish between correlation and causation. Understand the margin for error and confidence in your data. Communicating this to your stakeholders is critical.

4. Cognitive bias

Making decisions, or influencing and driving decision making is crucial, but how can you limit, or eliminate, cognitive bias from these? Take a look at some typical types of bias (see box), how would you spot them?

5. Visualisation & communication

Data doesn't make decisions, people do. Poorly represented and displayed data drives poor decisions, so it's important that analysis drives the right outcomes. Representing the data in a way which helps key information to stand out and support correct, or at least better, decision making isn't easy; especially as different people have different preferences. It's fair to say that one-size-fits all, however there is a limit to the number of methods you can use. Educating your stakeholders is key, as they will only know what they know. Help them to learn how to use the data, tables, graphs and dashboards and create a feedback mechanism.

Cognitive Bias: common types of bias

Built from ideas developed by Daniel Kahneman and others in the 1970s, a cognitive bias is a routine, often unconscious bias in our decisions and judgments, sometimes related to memory and how that is stored.

1. **Confirmation Bias:** favouring information that confirms previously existing beliefs.
2. **Self-Serving Bias:** tendency to attribute positive events to their own behaviour.
3. **Hindsight Bias:** the tendency to overestimate their ability to predict an outcome that could not have been possible to predict.
4. **Optimism/Pessimism Bias:** cognitive bias that causes someone to believe that they themselves are less likely to experience a negative event.
5. **In-group Bias:** tendency that people have to favour their own group above that of others.

Top tips from our Assisted Learning Pathway members

- The quality of your communication is determined by the quality of the response. If you're not getting responses to your comms, or the responses are confusing and piecemeal, this is probably because the comms you sent out were confusing and piecemeal. Take responsibility for the clarity of your explanation. If someone doesn't understand something you designed – and they are at least trying to understand – don't blame them, blame yourself.
- The skills that make a great analyst can be transferred to any role. A question I ask my staff who take daily calls from the general public is "What is the problem you are solving?" There is a tendency of them over complicating a problem so my advice is: Be short and concise, describe the current situation, describe the goal, describe the impact and include a timeline.
- Your outputs are only as good as the questions you ask to understand the business needs. A focus on improving the initial questioning from my team and the purpose of a data request that comes our way is helping us ditch all the business jargon and get to the point in providing meaningful insight.

Thank you to the following members of our first Assisted Learning Pathway for Insight Best Practice: Michael Jenkins, FSCS, Veronica Bobb, Royal Borough of Greenwich & Marissa Mannan, Stars Group

6. Understanding technology

Technology developments move at a fast pace, so the ability to embrace the right 'new' technology versus continuing with existing is critical. Being a pioneer and frontrunner is hard work, as you can end up just clearing the way for others to move faster behind you. Sticking with the old technology may be reassuring and help you to demonstrate your tried and tested skills, but this could limit you, your team and organisation in the long-term. So, don't be lulled into a false sense of security; push yourself to the end of your comfort zone.

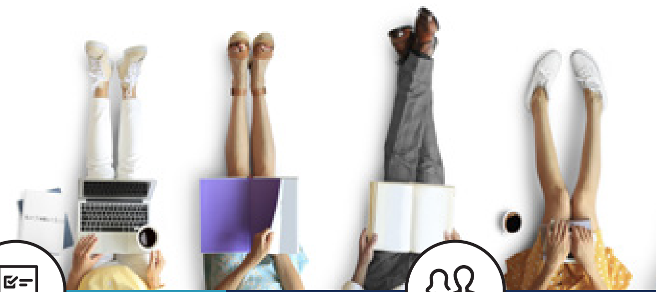
7. Rapid pace of change

Expectations and demands are higher than ever, and this is not likely to change. The aspiration for any insight team is to find solutions to problems before they happen and exploit opportunities nobody knew existed. When new requests are made, analysis and answers need to be fast and timely, or the opportunity will be missed. Rather than just being reactive, waiting for requests, or using data to report on and evaluate the ideas others have already had, we are now seeing insight teams being proactive. They understand their stakeholders' goals and use data, knowledge and experience to generate new ideas and insight. Take time to review your and your team's strengths and weaknesses. How can you use your strengths to improve the value of the insight you produce? Where can you use the strengths of others to support you? How can you focus your and your team's personal development to make the biggest difference?

Phil Anderson & Ian Robertson were talking to members of the Data, Analytics & Insight Forum.

The Forum Learning Academy

Best Practice in Insight
Assisted Learning Pathway



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BOTs, Apps & Chat: what makes a great online journey for customers?

How do we blend the personal touch with AI & automation? What's our role as analysts, planners or quality teams? From in-app or web chat to asynchronous messaging, Paul Smedley looks at the latest thinking and shares some examples of 'omni-channel' in practice.

Online success comes when we create experiences that work well for people. If you design online interactions well, people stay engaged online and do more with you. So, when you look at messaging, chat or ChatBots, think of them not as new channels, but as an integral part of making your website, app or social media more engaging. They are powerful tools, especially when we use AI, analytics & automation in a data-driven way, to make online interactions more personal, relevant and successful. As planners, analysts or improvement teams we can do much to spot opportunities, share examples and build the strategy. See also how rapidly you can pilot new approaches; this is not just for those with big budgets.

Omni-channel is not 'every channel'. Success comes when we create experiences that work well for customers. People stay engaged and do more with you, if their online journey is better, more joined up.

Automation & ChatBots

Let start with some examples. At **AA Ireland** (pg 34), web sales have been transformed by ChatBots. A single manager first built up a small team to pioneer webchat sales and then (in just 8 weeks) delivered the first ChatBot. It's the first point of contact off the website. It completes many questions automatically, but hands others to a live chat sales advisor. With a test & learn approach, advisors were fully involved, integrating their expert knowledge of objection handling so the Bot itself can now make valued suggestions to customers. At **Clarks** (pg 36), CAI (Conversational AI) became the third most popular way to contact within four months, with more than half the queries 'out of hours', making Clarks instantly accessible in a global, multi-generation world. At **The Very Group** (pg 46), the in-app ChatBot helps customers self-serve. Advisors in the model office identify opportunities for chat interactions, mapping out the end-to-end process and how the Bot could fulfil this. They also spot where human intervention may be needed and test the viability of the Bot live in their model office environment.

Omni-channel not every channel

When you start out, as a team, to support or plan for any digital channel, we advise you to use the **Strategy Pyramid** (pg 52) to create a shared view of what matters most and how you will drive commercial, customer or colleague benefits. Link your digital transformation plans to performance indicators that show the impact of each delivery strategy, use clear outcomes such as fewer dropouts from the online journey or rising sales or self-service.

It's good to unpick jargon that is flung around, so you can advocate an integrated **omni-channel** approach. The Oxford Dictionary defines this as 'a type of retail which integrates the different methods of shopping available to consumers'. Wikipedia speaks of a strategy to improve user experience, driving better relationships with an audience (eg customers, for an end-to-end journey). So, do NOT just set up new channel choices ('multichannel'), but connect touchpoints together to make a better, joined-up experience for customers. Think of iconic digital brands, like **Amazon**. It's mostly very easy to 'do what you need to do'; you soon learn the Amazon Way. Crucially, omnichannel is NOT 'every channel'. Far better to pilot a few things well, to create an approach that can be rolled out later, from web to app to social media.

Planning for digital

Make time to plan how you roll out each tool or channel. How will you resource? Manage the data? Improve customer experience? At the start, most people run small, stand-alone teams at a fixed size, managing demand to fit the resource. Yet, how often do we just jump into a trial, without being clear what we want to test? Use pilots as a structured learning period, applying the **scientific method** (pg 65) to set up and test hypothesis. Once you scale up, it becomes critical to manage resource drivers, so you need to model the impact of concurrency, skill level, handling time etc. Focus on resolution vs deflection rates; a new channel or tool can create more contact and you need to forecast the contact drivers. Plan the right level of automation to make this affordable and deliverable. Crucially, understand these dynamics in the pilot phase, so that you can build robust and fast-to-use capacity models before you scale up.

Analysis is vital

Consider the timing of when you interact and the choices you offer, setting expectations clearly. Use predictive metrics, with the capacity to trigger a playbook of options, with triggers for action. Build an integrated capacity plan, for your overall resource across all channels, to analyse scenarios and deflection, and plan the necessary changes or contingency. An omni-channel strategy should make end-to-end journeys better for customers, where pathways you can realistically support are a compelling choice.

Asynchronous chat

Think big but implement in small steps. When automating, consider how you can access and use information about the customer, their reason for contact and their journey. Integrate this into your website or app, as at **Capita** (2019), where a start-up technology partner captures questions the customer is asking and sources the answers from the website. **Jet2** (pg 24) are pioneering **asynchronous messaging**, piloted for Apple iMessage in a 4-week sprint, which is resonating strongly with a younger demographic. They're extending to other platforms and building their own platform for in-app messaging. 'Asynchronous' is messaging when it's convenient for you, with benefits both for customers and how we resource. Like WhatsApp or Facebook, you can be on it all the time, but you don't have to. You can ask a question and go back later. You can hold a one-to-one or group conversation. It's flexible, in contrast to **live chat** where you wait for a response, like in phone conversations, and setting the right concurrency level is key. Both are useful and both can use Bots. Webchat retains you on the website; this may matter less if customers are using apps or social media. Find out!

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The Forum Learning Academy

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Planning for Wellbeing

How can we build a workforce strategy that supports workplace wellbeing and builds a culture that sustains this? What can we learn from best-in-class in operational planning & resource allocation?

Explore trends, learn what the best teams are doing and gain insight from practical examples. Review how planning can help create meaningful work and a healthy culture, with flexible options that balance the needs of business, customers & colleagues. What can we expect of working patterns of the future? How can our people get what they need, in ways the business can afford? What does operational agility mean and why do you need it? How do we manage time and avoid the 'shrinkage squeeze'? Pick up best practice tips for annual leave and avoid inflexibility, unfairness or unavailability.

See more articles on the Planning & Resourcing topic on our member portal: www2.theforum.social/2020PlanningResourcing

2020 Vision

Twenty years of our professional community

The Forum
Raising Standards in Customer Operations

How can our people get what they need, in ways the business can afford?

How can planning help create meaningful work and a healthy culture, with flexible options that balance the needs of business, customers & colleagues? Look at some practical ideas and emerging trends, so you can deliver a workforce strategy that supports workplace wellbeing.

Research, by MIND, the mental health charity, shows three factors strongly linked to improving mental health and happiness at work: motivation, manageable workload and time to reflect. Alongside this, consider the psychological contract for employees, contract or outsource workers, balancing how people feel treated at work and what they put into the job. Does it seem fair? Does it make you an employer of choice or a great place to work?

Wellbeing strategy for planning

Above all, as planners, don't rush into solutions. Use the Strategy Pyramid (pg 50) to explore strategies for what we control as planners. Some decisions that impact wellbeing are made in strategic or budget planning, where operating model and financials are locked down. Decisions on-the-day can make or break your culture and impact 'manageable workload'. Yet scheduling and operational planning give perhaps the clearest view on how to support wellbeing. We are moving from push to pull, by letting people request what they need, rather than creating shifts that try in vain to cover all situations. We focus less on exact schedule fit, more on understanding volatility. Then we can create a suite of options and operational processes with in-built flexibility. We balance trade-offs in a way that is fair and healthy, reflecting the needs of colleagues, customers and the business.

What's important for colleagues?

For colleagues, time off matters, but also the work they do and the pressures they face. Understand how you can make people's lives easier; get their input first! Simple things can reduce stress and anxiety (see boxes): transport changes, the office environment, well-being programmes and flexibility generally. This will all change increasingly, as more organisations embrace home-working, become more agile and stand out as an employer. Working in collaboration with transport providers and other employers nearby, it may even be possible to influence transport timetables or adjust your working times to make it easier for people.

Business impacts and wellbeing

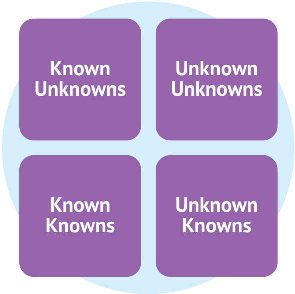
For the business, you need to understand corporate objectives (see Strategy Pyramid). Build enabling strategies around particular types of demand or volatility. Analyse the flexibility you need and the uncertainties you face. This will be changing, with growth in digital, let alone the 'unexpected' impacts of weather, virus or political change. Model the impacts of planned change programmes, as well as these external factors, and plan for this. As we say in The Forum, "if we fail to plan, we plan to fail". Finally consider where you start from – your contracts, systems, legacies of all kinds – and unpick the assumptions or expectations that keep you doing the same old things. As we also say, "if you always do what you've always done, you will always get what you always got".

The Customer Lens

The customer story is a vital part of engaging colleagues. People in customer operations don't generally come to do a bad job. If

Four Top Tips

- **Everyone is different.** Use data to understand your people and tailor their working pattern, but don't 'fit' people into patterns that don't work. This will ultimately break.
- **Define your limits.** Be clear what can and can't be done, prior to recruitment, and never undermine these limits. Use escalation points and reviews, but ensure the whole business signs up to these.
- **Collaborate.** A broad range of views creates better working patterns and limits. It also prevents any single bias; what seems 'fair' to me may not to you.
- **Develop a range of solutions.** One size doesn't fit all and the more you understand your people, the more you can create personal patterns and choice.

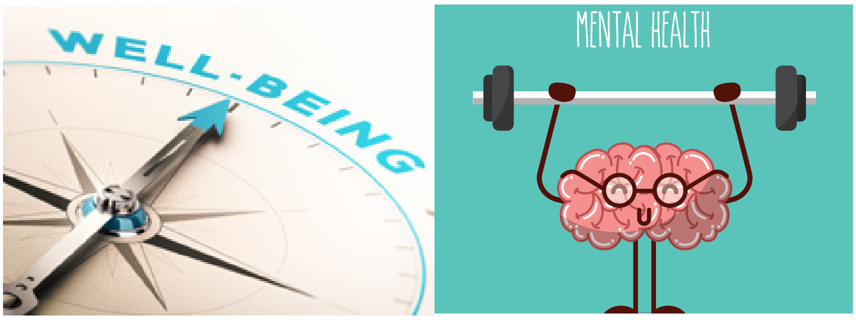


they understand why something is truly needed by customers, it cuts through the noise and the message lands. Using customers' words is always powerful (eg verbatims from surveys or what they are saying on calls and in emails/chats). Furthermore, it is easy to think that schedules are all about people, business and service standards. Isn't that often how we build our models? Yet, if the customer is truly at the heart of our service, we need to create a culture that matches the rhythms of their activity. Make sure these are clear in the customer lens of your strategy pyramid and draw out the implications.

Joining up the dots

For instance, in retail, be active when your customers are. 'Unsocial hours' is the way of life as it is if you serve a global market. The principles apply to business-to-business operations, utilities and finance etc – but with different lifestyle impacts. So, what kind of people are you in the market for, in terms of lifestyle? Do you recruit like this? Could you collaborate, rather than compete, in a local area to build this awareness? Do you need to consider national recruitment to widen your base, something now possible with homeworking? Do review regularly, as successful teams move away from a stop-start 'shift review', towards a choice of lifestyle options and automation of personal change requests. Finally, timing is everything and if you can piggy-back off another project or there is a window of opportunity, take your chance!

Phil Anderson & Paul Smedley are Directors at The Forum. Contact them at: phil.anderson@theforum.social & paul@theforum.social



Workplace wellbeing: three important ideas

- **The Psychological Contract** between an employer and colleagues is usually seen from the standpoint of workers, comparing how they feel treated and what they put into the job.
- **Wellbeing Index:** Research from MIND's Wellbeing Index shows that feeling motivated, having a manageable workload and taking time to reflect are the three factors most strongly associated with improving self-reported mental health, anxiety and happiness at work.
- **A healthy workplace** has well-designed jobs and flexible working options, with effective policy & process, where people feel valued and engaged in decisions. ACAS emphasise the importance of line managers, trained in people skills and identifying problems at an early stage.

Transport & accessibility: make life easier for people

Build this thinking into your shift patterns. If the working day starts when you leave home, this can be stressful. At the end, is it the same again? Do people need to start or finish at certain times, because of transport or care? How can we build positive experiences into the start and end of each working day?

- **Public transport.** 15 mins flexibility at start & end of shifts can make a huge difference. Help people get the bus they need.
- **Car share & parking.** If car-share were easy, it has massive potential. Consider taxis or a shuttle for some shifts (eg lates)? If parking is not on-site, could fresh air and a gentle walk become a healthy habit each day?
- **Walk, run or cycle to work.** Exercise is healthy and the cost of a secure bike shelter, a few lockers and a shower will soon see positive ROI.

On-site support: working together better and more happily

Good schedules are not all about scheduling, so think big! How could we help as analysts or planners to make this happen?

- **At-seat wellbeing.** Massage, messaging and emotional check-in surveys work well for some members. What works for you?
- **Onsite medical.** Could health checks, opticians or medics come on site? Or offer private rooms for online appointments? Could it reduce time off or support those who put things off?
- **Healthy food.** Make it easy to eat well at work. Consider free fruit & vegetables? Encourage people to eat together?
- **Fitness programmes.** Try walk & talk meetings or a fitness session or Yoga/mindfulness at start, end or during shifts. Try partnerships with local gyms. Focus on what is popular, not something no-one uses!
- **Sports & Social.** How many were removed by cost-cutting over the past 20-years? Team sports, a choir or dancing bring people together and can promote healthy activities out of work too.
- **What else?** Try asking focus groups. Others have tried ideas from onsite nurseries and concierge to bringing dogs to work.

Wellbeing: build a workforce strategy and grow a culture to support this

Workplace wellbeing and wellness may be high profile, but how do we ensure we are not paying lip-service or ticking boxes? Do you have a fully costed and embedded long-term workforce strategy? Is it embedded in your culture, 'how we do things here'?

In setting a strategy, be clear about the cost of different approaches. What do you as a business want to pay for? The workforce strategy that promotes welfare, wellbeing and development? Or, a low cost one-size fits all approach, where some people are too afraid of leaving and others leave before they've finished training?

Remember that wellness strategy is only embedded when it's the 'way things are done'. Satisfaction is felt and seen, not just an annual survey. Work and life are in balance. Colleagues work harder or flexibly, in the knowledge that their lives are being supported, as we've seen in recent months. The right mindset is key, underpinned by a psychological contract, and a workforce strategy.

In setting the strategy, there isn't an easy to follow process, but there are key areas you will need to address up front. Specific planning work, like working pattern design, only starts after this initial thinking. Try answering these questions both as an individual and a business – and ask them of colleagues. That's how you can identify any gaps in perception and be clear what matters most.

1. **Workforce strategy:** Using the strategy pyramid (pg 50), create a wellbeing lens, for you and for your business. What is your work and life purpose? What are your personal values?
2. **Trade-offs:** How much flexibility could you give? What could you get in return that makes this worthwhile? 'If ... then' thinking can help strike the right balance, personally and for the business. And be clear up front; set realistic expectations.
3. **Contingency:** How can you make plans with levers to adjust? How do you flex for changing demands and backup plans? What certainty do you require; what are the 'big-rocks' that can't be moved?
4. **Mental & physical health:** We all need healthy diet, exercise, fulfilling interests and social interaction. As a business, how do you support this? Personally, how can you best manage this around your working patterns?
5. **Learning review:** Discover what works for you. To remain relevant and future proof, you need to evolve, making changes where appropriate.

Recognise that we all have a natural 'unconscious bias', about what is 'fair' or what flexibility should be offered. Hard work, in building the right 'psychological contract', can be undermined by actions or words that aren't joined up – agreeing 'flexible working requests' that don't align to the operating model or authorising leave above pre-agreed limits. Or, if the leaders work traditional office hours and talk about evening/weekend shifts as unpopular or 'anti-social'. If our business operates extended hours, this needs to be part of our culture as a business.

Finally, measuring success can be difficult, because operational metrics can be driven by different factors and you need good analytics to understand the impacts of each driver. Sickness may be low due to incentives or targets, not just engagement or good health. How long is this sustainable? Are there invisible consequences? High tenure could be from fear of moving or lack of options. Equally, if people develop themselves, this may drive turnover. Employee satisfaction might come from low expectations; 'things won't get better, but I will roll with it'. What does that impact in the longer term? For quality or customer satisfaction, does long experience drive consistency or better outcomes? Do newer people need extra support?

There isn't always an obvious link between 'doing the right thing' and seeing a change in key metrics. However, be clear on your purpose, values and beliefs – and set benchmarks for key drivers, to compare yourself against.

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2020 Vision: what working patterns will we see in the future?

Looking back 20 years, much has changed, but not everything. What challenges didn't go away and what opportunities could the next decades bring? Will we break from the 5-day week? How much will we work from home? How will we think differently about working patterns?

Looking back over 20-years, it's remarkable how much attitudes and approaches have changed around working patterns. This was the topic of our very first Innovation of the Year in 2003 and we've seen some outstanding pioneer organisations ever since. At the same time, many are still locked into legacy approaches or fixed mindsets. So, looking forward, how do we raise our sights? What have we learned in recent weeks with Covid-19 impact, about working from home and being agile, swift to respond? How can data/automation be used to help personalise approaches? What will a 5-generation workforce be like? Can we learn from those pioneering a 4-day week?

Choices made easy

One size doesn't fit all – always a challenge for resource planning – and 'fairness' has many interpretations. What's more, until recently, we have been limited by the huge administrative burden when we tailor things for every individual. Inconsistent guidelines and lack of governance have also been issues. Yet today, technology can automate approval/action for individual requests and this is working increasingly well in some places. Why not think bigger? What if we built on the better bits of the gig economy? Anyone could be placing personal requests for time on, time out or swaps. People could then have clear sight of their lives, where working time fits in and how they can create the time they want for other things.

Personal life patterns

With data, you could also learn about the habits and behaviours of each person and make auto-suggestions (think Amazon). Imagine the impact of recommendations for shift, time off, car share or shift swap ('try this'). Could more data help us devise new lifestyle-working options, like customer behaviour is analysed for new product design or digital marketing? Perhaps we could overcome today's siloes. No more separate rules for part-time vs full-time hours? No need for flexible working requests? Support for work-life integration and wellbeing? Could we create a single governance framework to allow personal choice, within some limits of expectation, process and acceptable behaviour?

What if no one retires?

The population is getting older, but with a growing number of healthy 60+ year olds. Unlike in the past, pensions are less good and more people want to remain physically and mentally active in to their 70s and even 80s. This growing pool of resource provides new opportunities for customer operations, at all levels of the hierachy. This could aid skill and knowledge retention. It's also the chance to explore different working arrangements, such as 6-months working, 6-months off. There will be new challenges too. How do we blend GenZ and the babyboomers? What skills and flexiblity are required of leaders by this new breadth of people, skills, personalities, motivations and behaviours?

The four day week

According to recent YouGov data, 80% of Britons don't want to work 9-5 and 63% support a 4-day week. Today's 'weekend' began in industrial Britain in the early 1900s, with voluntary agreements later established in law. Big step changes came in the 1940s and with the Working Hours Directive. Already a few organisations are pioneering a cut in working hours, expecting better productivity (same pay but do more in 32 hours than you did 40). Others are looking at a compressed schedule (full-time hours over four days). Yet others, eg in the gig economy, are looking at shorter hours over more days. So how much do people really want longer weekends or longer working days? And what should we be considering if we want to attract the best workforce to a healthy workplace? If our people can get the best from themselves at work, we get the best for our business and our world.

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Best practice tips for holidays and annual leave

Holiday leave is an emotive subject. There are always complaints of inflexibility, unfairness or unavailability. Consider what factors are preventing you from allocating annual leave in a way that pleases your advisors and your organisation.

How far in advance should people be able to book leave? Whilst we want to make it as easy as possible for people, you also need to consider what is good for the business. This means your Wellbeing Strategy needs to consider the organisation's ability to meet demand irrespective of leave levels. But does this mean that there needs to be a controlled limit? Or should advisors just be able to book time off years ahead? What is best?

Providing certainty & control

Leave bookings may be subject to change. An advisor may be getting married – the venue may be booked two or three years in advance and, if deposits have been paid, there is a level of certainty that means the dates can be booked. At this point, you could even add on two weeks for the honeymoon! Whilst it's true that the wedding may be called off or the advisor could leave the company, you have to consider the likelihood and the impact of either scenario. Leave can be cancelled, and more leave will become available for everyone else in the organisation. Nothing is 100% guaranteed but, from a colleague perspective, long-term bookings give comfort and security.

Guidelines, disruption & tracking

Guidelines need to be in place that are easily understood and support people in having time off work in most circumstances. Don't look to over-control this or try to anticipate every possible situation. That will only make your process more complex. It's also crucial to keep in mind that time off is vital for people. We all need effective time away from work, gaining mental and physical rest and recuperation in the process. Your leave policy should encourage people to have booked time off at a steady pace throughout the year and typically in a mixture of periods (such as 2-week blocks and single days). In some areas, this is actually a requirement for fraud awareness. Tracking this, and supporting people, will prevent advisors from booking too much time (or too much at one time) and identify those not booking any. Part of the tracking should focus on advisors who change or cancel leave regularly. It is accepted that 'stuff' happens, and change is inevitable, so flexibility is required. However, there should be a process to prevent 'repeat offenders'.

Cancellation / Change

Cancellation is a problem when it happens at short notice, so the organisation needs to include a policy for the rapid redistribution of short-notice leave. Wait lists can be maintained and offering on-the-day time off can help to mitigate this problem. Also, make sure that leave can be taken in the smallest practicable units (e.g. an hour, rather than half-a-day). This could be adding a few dates earlier and taking some off the end, or moving the dates completely, e.g. one weekend to another. This shouldn't cause difficulty if the change is made with some notice as other shrinkage factors can be flexed to try to cover any shortfalls. Change is better than the alternative as at least the advisor will still be using their annnual leave allowance.

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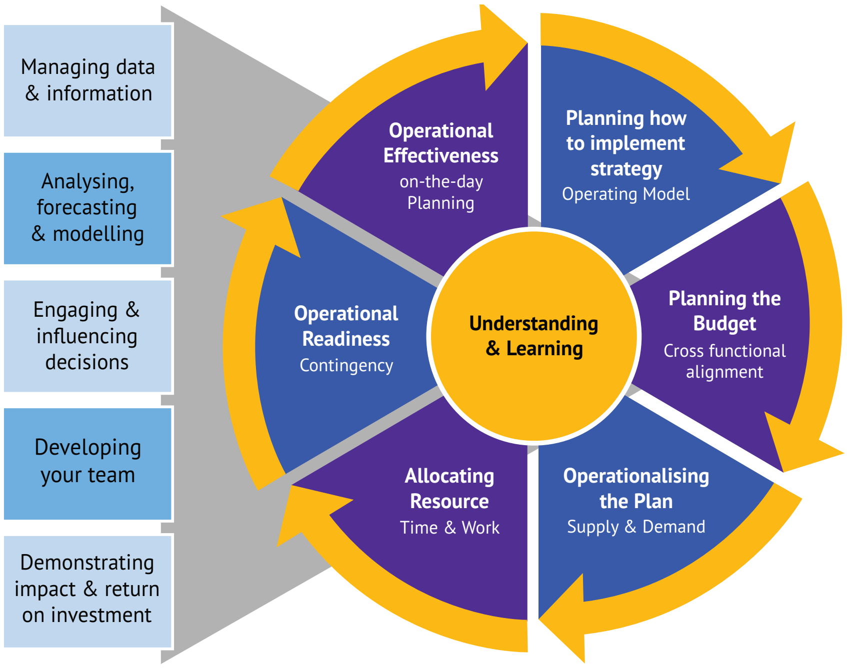
COVID 19: impacts on time off & holiday

Could we buy & sell holidays to fit around personal requirements? This may reduce bottlenecks when isolation regulations are relaxed, a LOT of staff will need a break, and there will be a huge amount of allowance to take in a very limited time. Carrying over holidays is never ideal, as it just kicks the problem down the line. What implications does this have to things like skills, development, coaching, attrition rates and other shrinkages? Most importantly, you do need staff to take wellbeing breaks during isolation and what does that actually mean?

Colin Whelan is Head of Workforce Optimisation at Hoist Finance

The planning cycle: operational planning, readiness & effectiveness

This best practice framework is the basis for successful planning teams. Learn what the best-in-class looks like and find out who has demonstrated these planning qualities in our recent Standards Benchmarking Assessments and Accreditation.



Operationalising the plan

When you have a great operational plan, the organisation begins to rely on it heavily – it becomes essential to the operation. Planning is in demand. Forecasts drive the deployment of resource and decisions on priorities. The best teams engage with stakeholders really well. They call out risks and opportunities, guiding the operation through workable solutions. Variances are reviewed frequently, understood and acted on. There are demonstrable benefits in areas like recruitment, turnover and time-to-competency.

Our best players include: **Santander Operations, RSA** and **British Gas**. Each produce three-dimensional plans that reflect the reality of their organisations, helping the plan to remain relevant all year. Their review cycles constantly hark back to overall strategy, budget and operational assumptions making sure the organisation's next steps are aligned to the strategy.

Allocating resource

This is scheduling people for work and allocating activities, for instance time away from the front line. Often, this concerns the advisors the most! At the highest level, teams shape the organisation's Workforce Strategy incorporating wellness at the heart of what they do. This helps provide advisors with meaningful work and maintains a respectful, flexible culture.

The best teams explore mutually beneficial working practices and engage with colleagues to understand what they do and the issues they face. They avoid unconscious bias. The top teams we have encountered include **AXA Swiftcover, Cooperative Insurance,** and **BGL Group**. Each of these teams offer a range of shift patterns for full and part time staff which are used in the initial attraction of new recruits.

Operational readiness

Operational readiness is preparing the business for the coming week or day. Best-in-class involves the regular review of plans and contingencies – and providing 'what-if' scenarios. Models are trusted and can play out complex scenarios of demand and supply across different business areas, allowing assessments to be made and performance levels to be understood. Using playbooks, planners and stakeholders prepare multiple scenarios and map out actions and contingencies.

Operational effectivness

Operational effectiveness is real time management on the day of operation. The best teams are adding insight, agile and able to react quickly to change. They learn from what is happening and feed it back into the Planning Cycle. Great teams have playbooks in place, so that everyone knows what to do in defined situations and there is stakeholder trust. The key is to automate as much as you can and make data-gathering as quick and simple as possible. Then use this to provide updates & recommendations.

Best-in-class

Best-in-class examples include **Cooperative Bank**, **LV=** and **British Gas**. These teams are developing contingency planning that balances the needs of different stakeholders. They understand the impact and context of changes in their business and the variances from the plan that these generate. Often, they are now automating key decisions and actions.

David Preece, Head of Programme Delivery & Alison Conaghan, Planning Specialist at The Forum. Contact them at: advice@theforum.social

Time management: the hidden danger of the 'shrinkage squeeze'

Time is often the biggest cost and so we are challenged to manage 'unproductive' time ever lower. But beware the unintended consequences of this 'squeeze', as cutting one area often leads to increases in others. Try our 5 Top Tips for managing shrinkage. Time matters!

We need to plan for time away from customer-facing activity (shrinkage), both 'productive' and 'non-productive', and avoid squeezing this, at all stages of the planning cycle. Usually this doesn't bring the expected results.

For instance, absence or engagement suffer if you have a poor process for time off or shift times don't work. Simply squeezing development time can increase sickness or wrap. Instead, you need to be able to predict and avoid unintended consequences. Therefore, the best approach to shrinkage management is to fully understand and manage the drivers. Then model the wider effects, to get the balance correct.

1. 100%: analyse all paid time

Start with 100% of your paid hours/ FTE – it's all you have to work with – then break it down. This can show you what proportion of your FTE budget is spent talking to a customer, in wrap, in idle or in other shrinkage. Mathematically, percentages add up to 100%, so if the %time in one category rises, another must go down. And if you cut %absence, what will people be spending more of their paid time on? Pie charts or the 'shrinkage circle' are a great way to show this.

2. Just enough and not too much

Some shrinkage is good! You prevent burnout if people get away from the front-line from time to time. But beware doing what you have always done. Demonstrate how it impacts the business. What does 7% communication or 5% sickness actually mean to your operation? You may find that you can't afford that time or don't need to invest so heavily.

3. Time off is required

Paid holiday is a legal obligation and people will be absent for many other reasons. Uncontrolled shrinkage is not a desirable outcome, so plan for this sensibly with good process/communication. Crucially, understand the drivers of absence and work on THAT. Is it seasonal or is there another factor? Understand your limits of control, so be realistic. These things are guaranteed to be worse in certain periods or situations.

4. Development is important

Communications, coaching and training are a vital investment, because this can drive engagement and performance. Unfortunately, often it can be a casualty when the plan and real life collide. This has consequences, so map these out and make the case for the benefits, such as quality, FCR, NPS.

5. Avoid the 'shrinkage spiral'

If people are disengaged or stressed, or you are heavy-handed in controlling certain shrinkages, you can soon see sickness rising, productivity drop or spikes in attrition. This cuts resourcing, often when you most need it, and it can very easily spiral out of control, so you spend more money or time having less resource available! So, think of the broader impacts of your actions from the outset.

Check it out! What are the drivers and the unintended consequences?

The best approach is to fully understand and manage the underlying drivers and model the wider effects. For example:

- **Sickness absence.** If it's a poor annual leave process or people can't get time off when they need it, absence can rise. Also, underdeveloped staff may be less engaged and more likely to be absent. If development time is always cancelled or limited, this will have wider impacts. Map these out!
- **When it's very busy.** Watch 'idle time' and occupancy, especially if you target talk or work time (AHT). People need time out when there's call after call, or a ceaseless flow of tasks or webchats. High wrap/after call work can often be a symptom of this. Analyse it!
- **Time stealers!** Poor processes or systems mean people need time to sort stuff out. For instance, do planners or team leaders have a stack of emails for time off or shift/break swaps? Just because it's untracked or invisible, doesn't mean it isn't happening!

Operational agility: what does this mean and why do you need it?

Changes come as a knock-out blow if you aren't agile and aware. So how could you roll with the punch, not end up flat on your back? David Preece takes a fresh look at agility for planners. Don't just copy others. Focus on what's unique about your own business, people & customers

'Agile' means many different things to different people. There are some great engagement approaches in agile methodology, like scrums, user stories, retrospectives. It's good to roll out changes in the smallest possible steps ('minimal viable product'), not try to see it all as one single programme of projects. Agile fits well with our Operational Excellence model at The Forum and the Plan–Do–Review model. An agile approach can bring control and rigour, while allowing you to 'fail fast', moving on to other things if necessary. **The Very Group** (pg 46) and **Three Ireland** (pg 32) demonstrate examples of agile at work to transform the business.

Agile also applies in the planning world, as the **RSA** case study (pg 28) demonstrates. Not only have they used agile methodology, but they have made resourcing agile and responsive to change for the business. In the Planning Cycle, we have Understanding & Learning at the hub and the 'wheel' can spin quickly to learn and adapt, if required. Even better, we can change gear – as at RSA and **LV=** (pg 26) – taking a more granular approach to strategy, modelling impacts and evolving the operating model, to be flexible in response to different changes. Reviews, checks and process handovers are of huge importance in the Planning Cycle. So, the best practitioners are constantly reviewing outputs vs expectation, putting learning into practice and building systems/models that make this process even quicker.

Good planning creates understanding about the limits of our flexibility, over both supply and demand. Ironically, we are in control when we understand where we are not in control! It is here where we need to be operationally agile, predicting periods when flexibility is required and putting actions in place quickly enough. Imagine a boxer, focussing on where he needs to be, in order to avoid being on the end of a knockout blow. There are teams in real-time, who are super-quick at reacting to change, but they are more reactive than agile. Agility requires you to be in the process of resolving an issue as it is happening or before it even happens. Here are five areas where I recommend you focus as a planning team. You will achieve so much.

1. Automation

Attempt to automate as much as you can and focus your automation on short-horizon or intraday activities. For instance, there are Real Time Automation tools and using these in practice can transform your organisation's understanding of agility, allowing flexible working practices to develop. If you don't yet have such a tool, still look to automate what you can. Collecting real-time data will influence your ability to react quickly and effectively to change. The capability to rapidly reforecast demand and get resource in place for the new scenario is an effective way to become agile.

2. Psychological contract

Instil the concept of rapid change into your business and create an environment of certainty within which uncertainty and change feel less destabilising for people. There is a great example of this in the back-office transformation at **L&G** (pg 18), especially their three week window for planned change.

Every single day is an opportunity to learn and make things better.

- Be flexible. Why try to manage people's activity by the minute, if we can't forecast demand that accurately? Control takes a lot of communication time and often frustrates our people.
- Sign-off. The key is to get an agreed 'playbook' of options in advance. Empower frontline teams to make immediate changes and minimise management intervention on the day, as it will delay.
- Quick & easy. Make playbooks simple to enact and automate processes if possible. They're far quicker to 'switch on'.
- Review & learn. Each time you respond to change, record what happens. Then review. Celebrate successes and, if there was a negative outcome, share the learning and change your playbook.

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Go for small/frequent releases and communicate when to expect changes, what isn't changing and how unexpected events will be handled. That's agile. If people feel they know what is and isn't happening, people will feel much more in control.

3. Understand drivers

It is vital that you understand the root cause behind the shift in demand or supply and model the impacts on your output metrics. This helps improve our learning, with understanding we can put to good use the next time. What's the impact of extreme weather? Has digital marketing just driven demand? Is there an outage somewhere? What is the traffic situation? Some drivers are well-known, but be prepared to keep digging deeper, layer by layer, to gain true understanding of why things are happening. That's agile too!

4. Knowns & unknowns

A lot more of what happens on a day to day basis is predictable. Situations are rarely one-offs; they often repeat. Consider your drivers; has this ever happened before? A full analysis of your data will show you that you have experienced these before, so you have some idea of the impact. Try to think of some 'Unknown Unknowns'. The very fact that you can think of some means they are no longer unknown! Agile again!

5. Statistical confidence

Finally, use mathematical methods to come up with predictions and forecasts. Avoid a single number and provide a 'BAU range' around your forecasts. For instance, don't say '2,000 calls', say 'between 1,800 and 2,200 calls'. You can prove this statistically and you will encourage the business to build in contingencies. Understanding variability is key to being agile and there are many other powerful tools for this. Consider descriptive statistics, control charts and 'what-if' models for instance.

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Customer Experience and Improvement

Great people deliver great customer experience and operations are fit for purpose when they are designed with that purpose in mind, with an operating heartbeat that powers improvement and quality.

If we want to make a real difference, we need to focus on the right things and engage the right people. How can we demonstrate tangible benefits and do more with our resource? Looking back, we can see how exceptional customer satisfaction boosts trust and drives better financial performance. Looking forward, we need to break down siloed thinking and align our work with the purpose and strategic priorities of the wider organisation, using some of the brilliant tools from the Strategic Planning or Digital Transformation chapters. Moreover, an environment for empowering and developing people powers excellence.

2020 Vision

Twenty years of our professional community

The Forum
Raising Standards in Customer Operations

Adding value with tangible improvement for customers, colleagues & business

In a volatile, uncertain world, we have to prioritise our work in new ways, to do more with our resource and demonstrate tangible improvement benefits. Alongside this, the need to transform customer operations is bringing the work of quality, insight & improvement teams closer together to drive change.

In a tough economy, demonstrable improvements are key for any support team. So, how do you make life better for customers and drive value for the business? Include process as well as behaviour, not just monitoring but driving change. Let's start with examples from our 2020 Team Awards.

Transforming your role

At **William Hill**, a new QA (Quality Assurance) approach supports 25% more colleagues with no more resource. Engagement is up 40% and CSAT up from 5.6 to 8.2 over 12 months, across in-house operations in Manila & Bulgaria and the UK outsourcers. A 5-step structure for Quality has aligned scores with customer surveys and speech analytics data. They are part of a team with communication, training and customer insight, reporting into the wider Improvement Team globally. At **npower**, the new QA model identifies process improvements, uncovering £1.5m efficiencies and lifting customer experience scores by a third. The QA team deeply engaged their offshore, back office partners in India and changed the focus of the assessment framework, by including key questions on whether the process was fit for purpose.

Where they drove change by transforming the role of quality teams, at **Legal & General** the back-office (pg 18) was transformed by collaboration between transformation, planning and operations team, while in the contact centre (pg 38), PowerBI dashboards enabled the development of a coaching culture, cutting stress and anxiety related absence, by changing how performance is managed. At **VitalityHealth** (pg 44), a new Quality Framework is powered by speech analytics automation. Care scores rose by a quarter and NPS by up to 18%, with a 4.5 star rating on Trust Pilot. Based on 100% sample, they automated 20 years' manual effort, demonstrating what is possible with analytics for QA or Insight teams. At **Radius**, the introduction of Quality Management from **Zoom/Natilik** in global account management roles has brought visibility of quality and customer experience.

Process and operating model

When we change processes, to remove pain points and increase efficiency, this is a visible, tangible benefit. Quality and Customer Insight teams bring a special contribution, looking at it from both customer and colleague perspective, important in both front and back office. An organisation loses out if process improvement is just the preserve of a separate improvement or project team. It can be tempting to add new levels of complexity when we set up or review a process, yet the simplest processes are normally best. They are more efficient, easy to learn and have fewer points of failure. By engaging front-line teams and using the quality process to ask questions about whether a process is fit for purpose, we build improvement into business-as-usual. Moreover, process improvements rarely happen in isolation, as new tools, systems or behaviour often drive or enable process change. We need

How to drive improvement and add value

Are we asked to be part of change teams? Do we bring in new ideas? If we are informed on developments externally, we can spot opportunities internally and help make the case for change. Typically benefits arise in these areas:-

- **Changed behaviour** – impacting customer/colleague satisfaction, costs, sales or customer retention. We don't control behaviour, but we can influence it and track changes.
- **Changed process** – removing pain points or wasted effort, doing more with less or changing policy, role design & operating model.
- **Technology** – changes how customers engage with us and how we work internally or in our own role.
- **Risk avoidance** – checks surface issues. We can mitigate risk and put in safeguards, going forwards.

to be very well informed, exploring both what technology we already have and what others are doing outside our organisation.

Behavioural change

Another area of tangible improvement is when we help our people act in a way that delivers the best possible outcomes. This is hard to deliver, but fundamental in all customer operations. Consider training, support, knowledge sharing tools, coaching, feedback, targets and motivation. At **Motability Operations**, Quality Coaches have sustained exceptional customer and colleague engagement over 10 years, by placing the emphasis on empowerment and self-development for front-line teams, keeping the customer always in mind. The focus is firmly on 'giving them the reigns' rather than this being driven by their managers and the organisation's KPIs. With this kind of coaching, people become increasingly able to self-reflect, building the passion for self-development. Clarity on the responsibilities of advisor, team manager and coach has been key, along with support from the communication and knowledge management team, so that process and knowledge are constantly updated and advisors are free to focus on how they communicate with customers.

Learning: safeguards vs checks

Finally, while it's important to surface and mitigate risk, are our monitoring checks all essential? Take time to review the value you offer here – and learn from errors, driving both process and behavioural change. Add automatic safeguards; these stop errors happening again. Only use checks when a safeguard is not possible, as they're time consuming and we pick up errors after they have happened, which may be too late. More broadly, clean up your data to find issues and set up safeguards to prevent these arising again.

Collaboration is key to improvement, since we don't maximise our value when we work in siloes. That is why aligning goals and priorities as support teams is vital. Moreover, quality and improvement teams are coming together much closer today than we saw over the last decade or more, and some teams form part of a wider support function, broadening the scope for positive impact.

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Purposeful operations: pyramid principles for customer experience

Operations are fit for purpose when they are designed with that purpose in mind. Likewise, if we want to be valued and effective, we need to align our work with the purpose and strategic priorities of the wider organisation and the Strategy Pyramid is a brilliant tool for this.

The Strategy Pyramid (pg 52) is a great place to start in reviewing your team and determining whether your assessment or performance frameworks are truly fit for purpose. After all, the best improvement teams have a robust governance process, that sets priorities against the company's strategy. The best quality, insight or customer experience teams can relate their work to a clear customer strategy and join up the metrics.

Four Lens Model

Yet, too often, even if we have lined up our customer metrics, we don't support colleague engagement or compliance is still tick-box in approach. That's why the key to the Strategy Pyramid, for many teams, is the Four Lens approach (see box). We need the right balance, so that the focus on compliance is not so strong that we do very little on the customer or colleague side or the other way around. And there is no secure future for any team that doesn't have a clear eye on commercials and the way that we each add value (pg 88). Balanced strategies prevent siloed thinking. For instance, we may see Planning focus on costs or budgets (say), while Quality look mainly through the customer or compliance lens. It is worse still if managers don't balance their scorecard. Colleagues are stuck in the middle with conflicting priorities.

Colleague & Customer Lenses

Looking through the customer lens, whenever we assess a contact, task or process, we need to be asking key questions. How could this experience have been better for the customer? Is the process (or system) fit for purpose? How confident was the colleague in this instance? It's important to remember that this isn't just about behavioural change; we may need to review the process or system. Colleagues are highly impacted by the work of quality, coaching and improvement teams, a great way of helping people develop. Yet, finding fault, apportioning blame and setting unrealistic expectations can be so damaging. Recognise both what is good and what needs improvement. A culture of blame will prevent people taking ownership and hinder improvement. So, in quality or coaching, there needs to be a clear contract of ownership – and genuine empowerment in the way that people handle customer interactions or develop themselves.

Don't work in competition

It's important that our quality, coaching and improvement functions deliver commercial benefits and help us meet regulatory requirements. Yet too often, sales, cost, quality, customer or compliance priorities compete. So, if customer retention is key, what questions should we ask when we review a contact or task? What would motivate this customer to leave? Or to stay? Or to buy again? People's time is a key cost, but we can't drive out value-add activity or just to paint a 'go faster' stripe. Instead refocus productivity in new ways for people, with QA and coaching. For both customer and business, we need to get it right first time (pg 91) and redesign operating models, to avoid transfers and escalations (see opposite). Are we truly fit for purpose?

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What do the Four Lenses mean for the work of your team?

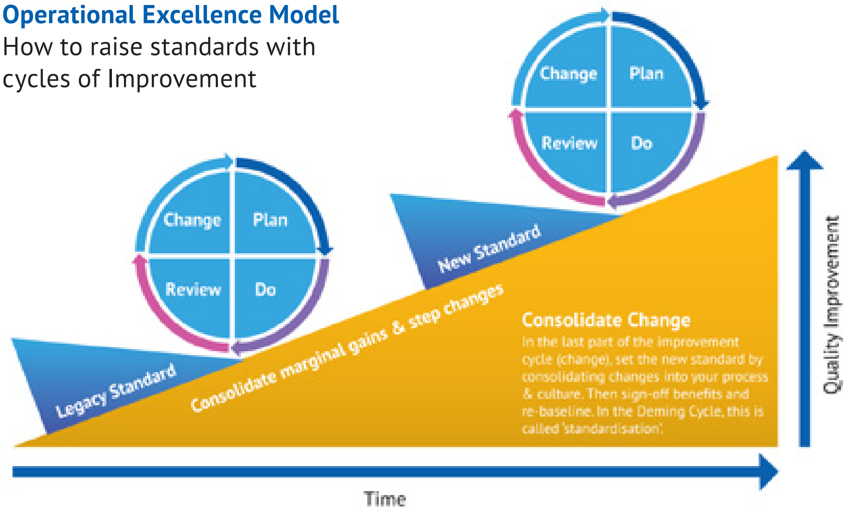
- **Customer Lens.** Do we always understand how a contact or process fits into the end-to-end journey? What matters most? What's the downstream impact of what we do?
- **Colleague Lens.** How do we empower people to do what the customer needs? Are we setting realistic expectations? How do we learn form our people? How do they learn?
- **Commercial Lens.** Where are the gaps in our data? Which aspects of customer experience do we not make visible? What are the impacts of this? How does this bias our decisions?
- **Compliance Lens.** What helps people become confidently compliant? And how do we improve compliance, not just measure it?

Developing a learning model that powers excellence in customer operations

Great people deliver great customer experience. That's why creating an environment for empowering and developing people requires an operating model with this purpose at its heart. Learn from practical examples and explore the emerging trends.

Operational Excellence Model

How to raise standards with cycles of Improvement



Empowering and developing people is fundamental to customer experience. While this includes improving processes and developing people, strategically you need an operating model with this purpose at its heart. Use the Four Lenses and the Strategy Pyramid to build a learning model into your operating rhythms, as we see from the Operational Excellence Model at The Forum. True engagement comes when people own their development and the work they do supports this. This happens when you design tasks, roles, workflows and knowledge management with this in mind. It's a key responsibility for every support team, not just operational leaders. Let's take some examples.

A learning environment

A new operating model at the **Financial Conduct Authority** (FCA) gives experienced advisors all calls for one type of business, so they learn quickly and build a rich picture. This skills strategy builds on a progressive learning model, empowering people to own their development, and integrates the contact centre into the wider supervision framework – a strategic asset. Advisors spot broader issues and opportunities, in dealing with seemingly simple transactions – an intelligence team. Speed to competency halved and handling times held constant, despite more complexity. Hold times plummeted, due to routing changes, and it opened up talent development into specialist supervision roles.

At **HM Revenue & Customs** a vast change of culture in the Tax Credit & Child Benefit operation in Scotland proved that contact centres don't need to be 'micro-managed' to deliver results! They moved away from a legacy top-down, tick box, stats approach and a culture of learning focussed on engagement, capability and trust. Advisors are empowered to 'do the right thing' for customers and story-telling helped frame the new approach. Workplace wellbeing is developing, with an advisor working group, 'walking meetings', a desktop 'emojinal register', chair yoga etc. Moreover, as people thrive and develop, diversity grows and performance management is transformed. Weekly Quality Boards drive process improvement from the bottom up.

Knowledge management

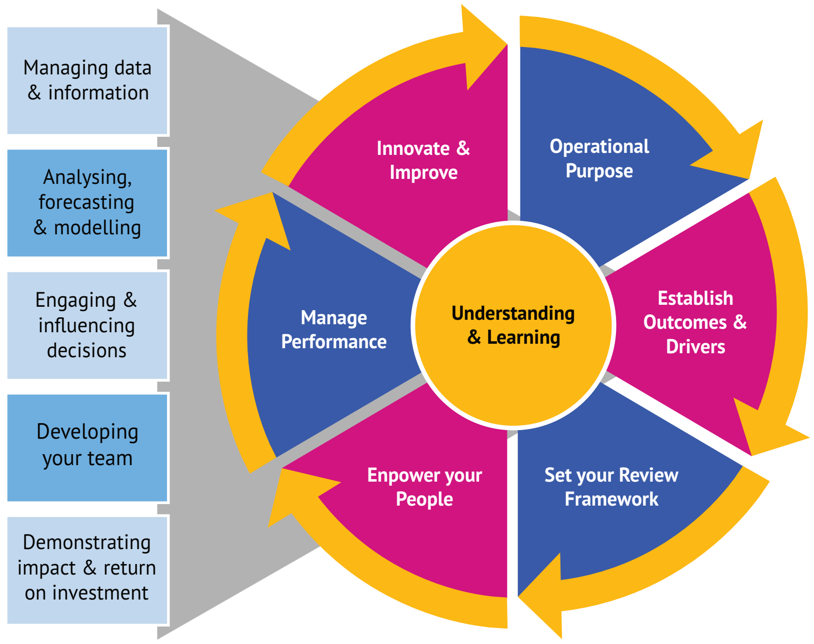
Communication and knowledge management are critical too, and the best way to drive process consistency. Routine online feedback from advisors, for instance, keeps knowledge relevant and up to date, as at **The Very Group**, where refreshing KEVIN helped cut transfers by 10% and save 300k annually. As they say at **Motability Operations**, "confidence doesn't come when you have all the answers, but when you are ready to face all the questions". AskMo means people are confident about what to say and do, freed to focus on how they interact with customers. Cognitive design uses icons, colours, links and process maps. Above all, engagement across the business, as well as within the operations, is key to maintaining a single source of the truth that is trusted and used. Notably, everyone is fully multi-skilled within any one business area and there is no need for an IVR.

A rigorous approach to updating knowledge and a culture of self-managed learning work hand-in-hand – and an operating model with learning at its heart sustains and develops operational excellence. That said, it is still crucial to consolidate as we raise standards (see image), 'crystallising knowledge' and ensuring there are effective ways to share and learn.

Paul Smedley, Founder & Chair at The Forum. Contact him at: paul@theforum.social

Explore the new best practice framework for quality & improvement

The purpose of quality and improvement teams is to continually review and improve. Success comes when we have a defined role and purpose in the business and our work cycle powers change, acting like a heartbeat in an empowering, customer-centred performance culture.



To make a real difference, we need to focus on the right things and engage the right people. The cycle has this purpose at its heart, linked to best practice knowledge from the last 10 years. Get in touch if you would like to use it to benchmark or re-define your role and purpose as a function. We also invite you to help us develop the framework to use as an external audit or for accreditation, proving so valuable in planning.

1. Operational purpose

To set yourself up for success, you need a clear view of who defines this and how you track it. Spend time understanding these people and their priorities, linking back to the organisation's strategy & KPIs. The Four Lens Model and the Strategy Pyramid (pg 86) are brilliant tools for this and agreement on a clear operational purpose at this stage can avoid a lot of wasted effort, later in the cycle. You will need to define (or redefine) your role by fleshing out how your quality and improvement heartbeat supports this purpose. What is success for customers? Or colleagues? What improvements are we driving?

2. Establish outcomes & drivers

The second strategic stage defines delivery strategies for customers, colleagues, business & compliance. To be 'fit for purpose', what outcomes are you looking to drive? What is 'good'? Work through the detail each type of contact or process, using pyramid principles. Use analysis & feedback to understand the drivers of each outcome and create models that look ahead (predictive). Next, map out your stakeholders and engage them in defining their role, accountability and expectations in relation to these outcomes. Include frontline colleagues, customer and process champions, business leaders and those responsible for regulatory or contractual standards. It's not only your role that needs defining.

3. Set your review framework

The next stage is to define your monitoring/assessment framework and review cycle (see box). For continuous improvement (CI), you need to use both colleague feedback and data-driven insight (Scientific Method pg65). For quality assessment (QA) you need to optimise questions in monitoring forms. Consider how you use them to develop people or improve processes. A new question (or data view) often uncovers new opportunities, but don't have too many or you lose focus. Increasingly, monitoring is data-driven, with interaction analytics or machine learning (pg 56 & 62) ever more important. Automation of some kind is crucial in being able to do more with less and all this does require a distinct skill set. Remember to look at whole end-to-end customer journeys and monitor digital, back office or branch activity, as well as calls.

Do you need to redefine your Review Cycle?

Most organisations work best when there is a strong underlying heartbeat of quality & improvement, plus other cycles which are specific, time-limited and linked to a theme or a business imperative.

1. **Review your current operating rhythms.** Do you hold weekly, monthly or quarterly reviews for quality or performance improvement? Is there a separate continuous improvement cycle? Is the focus on quality or improvement distinct, or lost in general business reviews?
2. **Establish what needs to change.** A single business-as-usual 'heartbeat' is far more effective than siloed meetings. Drive oxygen around the body by building shared habits for powering improvement, both behaviour and process.
3. **Projects or corporate initiatives** will have separate governance and the cycle can help you here too. Try an 'agile' approach, as quality and improvement are especially well suited to iterative development.

4. Empower your people

The last half of the cycle looks at how you manage learning, performance and improvement. They are connected, but here we focus on each stage in turn. Great people deliver great customer experience, so if you want to empower people, put this at the heart of your operating model, with individuals owning their own development. Be aware that what we often call performance 'coaching' is mostly not coaching at all. Better results are coming when we separate feedback (eg pulling information from PowerBI dashboards) from coaching (interactive, curiosity-based 1:1 sessions). Self-awareness is the foundation for this, so take great care to build it and induct new recruits into this way of thinking from the outset.

5. Manage performance

Performance management focusses on what matters most to the business, to deliver commercial targets or manage time/cost. Tailor this to an individual's performance (eg those not performing vs role models). Separate the roles of coach, assessor & manager in supporting this. Avoid inherent conflict between metrics (common in balanced scorecards) and the use of different types of target (pg 55). Above all, align metrics (especially customer measures) and look at the end-to-end journey, since most inefficiencies are otherwise not visible. Finally, who gets involved? Understand how and why they become truly engaged and how they drive improvements.

6. Innovate and improve

Create improvement loops, using data or feedback to drive service recovery, improve process or knowledge and influence behaviour or feeling. There may be different stakeholders, risks, governance etc. Plan out the best approach for each, different processes within one single operating rhythm. Distinguish what works best for process/system change from an innovation – or a change in policy or operating model. Knowledge management is a key tool for process consistency. When you want to change behaviour, analyse what can block or drive this (for whom?) and how you best influence this. Metrics have a powerful impact, for better or for worse.

Drivers of success

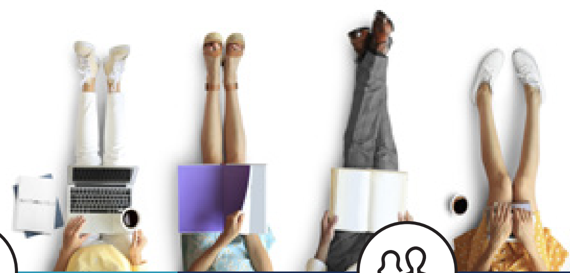
Understanding and learning is at the heart of the cycle, vital to improve the improvement process itself. Calibration (or 'levelling') gets us consistent about what is 'good', but do we have a discipline for getting better at improving? Most organisations work best when there is a strong underlying heartbeat of quality and improvement, together with other cycles specific to a theme or a business imperative (see box).

Finally, on the left of the diagram, five key activities power the improvement cycle. You can learn from the best, across many support functions. Join up data, with automation, and be quick to add new questions/data. Be sure your analysis is driving the right action & influencing strategy. Review where you focus and how you communicate and learn. Keep future-proofing your career!

Paul Smedley, Founder & Chair at The Forum. Contact him at: paul@theforum.social if you would like to be invovled in developing this best practice framework further.

The Forum Learning Academy

Quality & Improvement
Assisted Learning Pathway



Group Learning
Work interactively and learn from others

Tailored & Bespoke
Learn specialist skills to power your development

On going Support
Applied learning, mentoring & specialist tutors

Dig Deeper
Specialist modules, 6 months support to apply learning

Gain Accreditation
Professional accreditation and a completion certificate

The Quality & Improvement Cycle
Learn how to put customer experience & at the heart of your operating model & culture.

Assessment that's Fit for Purpose
Understand the features of a monitoring & prioritisation framework that drives improvement.

See what Best Practice looks like
Gain insight from practical examples, emerging trends and top tips, seeing how to avoid key pitfalls.

Driving Powerful Improvement
Learn how to use data/feedback to drive service recovery and change processes & behaviour.

www2.theforum.social/learning

Contact Ian at advice@theforum.social | 0333 123 5960

Research Update

Customer Satisfaction: the 2020 UK Index

The Institute of Customer Service

Looking back over 10 years, UKCSI research demonstrates that customer service matters because it delivers better financial results, helps improve productivity and creates trust.

The January 2020 UKCSI score is 1.3 points below its peak of 78.2 in July 2017 and is at its lowest level since July 2015. 28% of the 259 organisations listed in the UKCSI fell by at least 2 points (out of 100), compared to 20% of organisations in January 2019.

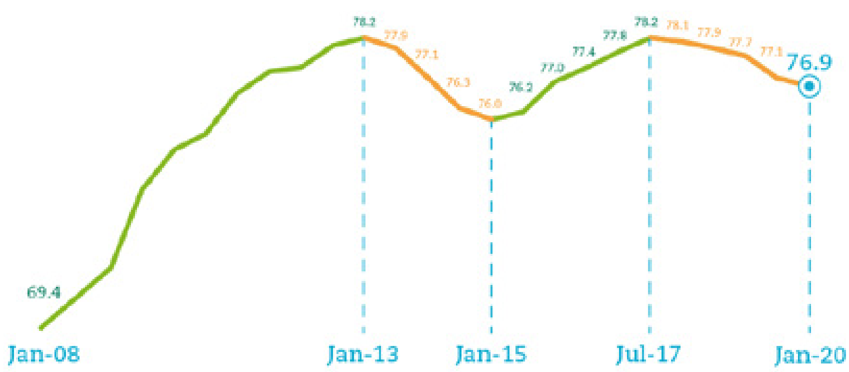
Five dimensions of customer satisfaction

The UKCSI reports on five dimensions of customer satisfaction, based on the attributes of customer experience that are most important to customers and which have a strong influence on customer satisfaction. Each of these dimensions – Experience, Complaint Handling, Customer Ethos, Emotional Connection and Ethics – are rated lower than a year ago.

13.6% of customers experienced a problem, broadly unchanged compared to a year ago (13.9%). Despite the small overall decline in customer satisfaction there was a 2.1 percentage point increase in the number of experiences rated as right first time (to 80.6%). Customers' trust in the organisation they dealt with is 7.6 (out of 10), 0.1 points lower than a year ago.

Key learnings from a decade of the UKCSI

- Achieving consistently high levels of customer satisfaction delivers better financial results
- Focussing on customer service creates chances to raise productivity
- 9/10 or 10/10 for customer satisfaction boosts trust and reputation
- Organisational culture is the foundation of excellent service
- Excellent service is built on experiences, emotions and ethics
- Preventing problems is as important as complaint handling
- Employee engagement & customer insight are now more critical
- Deliver a consistent experience across channels and make it easy to access help



Top Ten UKCSI Scores

Jan 2020 Rank		Jan 2020 Score
1	John Lewis	85.6
2	first direct	85.4
3	Next	85.1
4	Nationwide	85.0
5=	Amazon.co.uk	84.1
5=	Suzuki	84.1
7=	Debenhams	83.8
7=	Ikea	83.8
7=	Superdrug	83.8
10	LV=	83.3

UKCSI Score by Sector

Sector	Jan 19	+/-
Retail (non-food)	80.3	-1.3
Leisure	80.0	-0.3
Retail (food)	79.9	-0.7
Banks/Bsoc	79.5	-0.9
Tourism	79.5	-0.8
Automotive	78.4	-0.5
Insurance	78.4	-1.4
Services	76.7	-0.2
Public Services*	75.2	-0.9
Telecom/Media	74.8	+0.4
Utilities	72.3	-1.5
Transport	71.2	-0.6

*National Services. Local are 73.6, 2.1 points lower than Jan 19.

The UK Customer Satisfaction Index (UKCSI) is the national barometer of customer satisfaction, published by the Institute of Customer Service, every six months. The latest survey assesses 259 organisations, across 13 sectors, based on 45,000 customer responses.

To access the reports, please visit visit www.instituteofcustomerservice.com/ukcsi.

Getting it right first time: six top tips for raising standards

First Contact Resolution (FCR) can drive huge benefits, but it is challenging to track. So, explore the strengths and limitations of using this metric, so that you succeed. When we get it right first time we can improve customer experience and save costs at the same time.

We are increasingly seeing a focus on First Contact Resolution (FCR) also called First Time Resolution (FTR or Right First Time (RFT). In any process, unnecessary repetition is a waste. If we get something 'right first time' we shouldn't need to do it again.

It is good to look at this strategically, from the perspective of all the Lenses in the Strategy Pyramid (pg 52). What does successful contact resolution look like for customer, colleague and business? Unnecessary repeat work costs money – what drives this? It also frustrates customers and colleagues. There can be regulatory implications.

The problem for many members who talk to me about this, it that this is a challenging metric to track and challenging to improve. So, here are some top tips that I have been sharing with members recently. Let me know how you get on.

1. Build your own solution

We know what we are trying to achieve, but in fact there's no standard way of measuring FCR, because it depends on your systems, data and process. You won't always capture the customer details. You can't always distinguish if two calls (from the same number or customer) are related. You may class some repeat contacts as unavoidable or desirable, if someone needs to call back with more information or is following up on a sales lead.

2. There's no perfect measure

As a result, it's not possible to measure FCR 100%. So, build in an appropriate level of allowance and focus on the improvements in the metric, rather than the value itself. Remember, there are some repeat contacts you can't see, but if you are seeing a drop in the ones you can, odds are this is being replicated in the rest.

3. FCR is a lagging measure

You won't know how many of today's calls have driven repeats until later on, so it takes time to see the impact of any change you make. Set an appropriate cut-off for when a second contact counts as a repeat. Try analysing contacts by the same customer to establish the drivers, then tag the data accordingly. There will be large variance but plotting % repeats against time should help you establish the sweet spot. I have seen this range from 24 hours to over 28 days. Remember, the longer this period, the bigger the delay in taking action on the data.

4. Effect on metrics

Improvements in FCR can negatively impact on certain metrics. AHT may increase even overall productivity is actually improving. So, think about the metrics you use. For instance, one 8-min call takes less time than two 5-min calls. It increases handling time and cost per contact, but cost per customer will most likely reduce.

5. Track contact on every channel

Customers will shift channels, so for a true FCR view we need to consider all channels. Focussing in just one channel (eg phone) can still drive benefits, as long as we don't end up driving channel shift.

6. Ownership and learning

To drive improvement in FCR you need to coach effectively, ensure that you link calls in a timeline, start by listening to the latest content to see what drove the repat, then look at the earlier contacts. Was it an avoidable repeat? What could have been done differently? Ensure everybody takes ownership for their part of the journey.

To make this work, you 'just' need to get everyone working together towards a common goal: operations, insight, quality, customer experience, continuous improvement and planning. Despite the challenges, when correctly used and understood, FCR has the power to transform your operation.

Ian Robertson, Insight Specialist at The Forum. Contact him at: ian.robertson@theforum.social

Planning and Insight for end-to-end customer journeys

See how pioneering analysts are optimising capacity and resource end-to-end, in field, branch, contact centre and back office operations. When everything is planned in a joined-up way, our workforce strategy can be fit for purpose in a digital world.

End-to-end planning is a colossal opportunity and we're inviting pioneers to join our emerging network, to shape the future together. You can't grasp the big chances or manage 'unknowns', if you are just planning or analysing in a silo. COVID-19 has opened new areas for change and the growth of digital channels is creating more tasks and processes than we ever imagined when The Forum kicked off 20 years ago. Successful call centre and back office planning teams are a brilliant source of expertise, as joined up decision-making makes visible how we deliver for customers, and at what cost. This helps us drive innovation and improvement.

See more articles on the Planning & Resourcing topic on our member portal: www2.theforum.social/2020PlanningResourcing

2020 Vision

Twenty years of our professional community

The Forum
Raising Standards in Customer Operations

Calling planning pioneers: it's time to plan end-to-end for customers

See how pioneering analysts are learning to optimise capacity and resource across customer journeys (end-to-end) and business siloes (side-to-side or front-to-back). Everything needs to be planned in a joined-up way, driving your workforce strategy. How do you want to become part of this?

End-to-end planning is a colossal opportunity and we're inviting planning pioneers to join this network and shape the future of planning together. You can't grasp the big chances if you are just planning in a silo and **COVID-19** has opened new areas for change. We've had the license and need to do things that may have seemed impossible before. Organisational strategy will be urgently changing, given the **economic impact**, as we come into the 'new normal'. Are we ready to grow, desperate to get steady, needing to drastically cut back or looking to fill a gap left by firms that didn't make it?

The future of planning

This brings into sharp focus the potential for planning and we need to think end-to-end as we've seen with the NHS. While the front-line takes much applause, there are so many other factors that enable them to do their fantastic job, not least logistics around supplies. The front line in many of our organisations have big supply or fulfilment chains and external partners. In field operations, we need to plan for tools, equipment, materials, vehicles, permissions etc. To plan in a joined-up way we will both build on **crystallised knowledge**, from the last 20 years, and transform it, as end-to-end thinking shapes our workforce and wellbeing strategies and brings new ideas back into contact centre planning. We need to work side-to-side across an organisation, building consistent planning principles and data. Look at where one area impacts another, across channels or by blending and cross-skilling. Look at your operations from a customer perspective, modelling **end-to-end journeys** and joining up the tasks, touchpoints, handoffs and dependencies that contribute to an overall customer experience.

What is an end-to-end plan?

What should it look like? What will it help us do differently? As we go into new areas, don't just replicate what you do now, but evaluate new scenarios and create the right operating model to support your strategy. At the start of the Planning Cycle, begin with strategic analyses, budget alignment and baseline your current operating model. Don't plan in siloes, optimising each bit in isolation. Learn from teams in our standards benchmarking. **RSA** (pg 28), are making strategic planning more lean, agile and connected. At **LV=** (pg 26) the new planning proposition has been driven by System Thinking and a clear purpose. At **Sky** (pg 30), pioneering new approaches for Field, there's a massive commercial focus across the business and capacity for innovation in the planning team.

Capacity: supply vs demand

If you haven't got a joined-up capacity model, now is the time to build one. Spend lots of time **talking with people**, so that you understand exactly how things are done in their world. You need to understand an end-to-end process before you can plan for it. At a science research organisation, there was much information in people's heads or notebooks. This needed teasing out, with careful questioning and discussion. Never assume a word is used in the same way as you might use it. 'Paid time' turned out to give information about resource utilisation. As a planning pioneer, be clear about the information you need for capacity planning, across the whole planning cycle. Explain this effectively, discuss assumptions and help stakeholders understand what data could validate

Top Tips for End-to-End Planning

1. Understand your organisation from a customer perspective. Model end-to-end journeys: tasks, touchpoints, handoffs and dependencies.
2. Deepen your knowledge of how the organisation works. How do support areas enable the front-line to deliver? Plan for this.
3. Identify what drives both customer interactions and internal process. Use this as a basis for your forecasting. Forecast for support areas too.
4. Build credibility in your plans and join up conversations. Show how your plan creates opportunities to drive improvement.
5. Use end-to-end planning as a catalyst for your workforce strategy: supply vs demand, skills, flexibility, home-working & site strategies.

or challenge these. Remember, you won't need all that information from the outset. Interactive, assumption-based, **'what-if' models** can generate a huge amount of understanding, when starting work in a new area or sharing learning with other departments or organisations.

Proving the concept

Be careful to avoid creating something that doesn't have an audience. End-to-end planning requires buy-in from the very top and if you don't have this yet, you need to build credibility step-by-step. A proof of concept can help hugely, to show what people are not currently seeing and how you can help them with this. This is a common challenge across many sectors, either as an organisation not used to customer planning or a function outside the contact centre. In one **field operation**, the training plan aligned to nothing before planning got involved. Nobody picked up that a lot of training attendees failed to attend and needed rebooking. Often there's a huge amount of failure, but its invisible because it's not measured, and no-one sits down to talk about why it is failing.

As planners we can start by talking to people and joining up the conversation. In an **insurance** company, where planning was new to the account management teams, there was little planning structure, it was impossible to see the wood for the trees and forecasting demand was a good first step. You often need an external perspective to help you find the way out of the woods, people who have seen it done before. In **housing**, this proved a real eye opener, when some illustrative 'what-if' models demonstrated how the business was actually working end-to-end. This can be hugely valuable to business leaders. Look for practical things that get people thinking and an audience who can use this.

Tackling data challenges

If there's been little or no resource planning, data will have been collected for a different purpose, which is why it has an unfamiliar name, but there is always data about some things. Equally, it's good to know where there is no data, as giving visibility here is a potential 'quick win'. In gathering data, there are usually many obstacles to overcome. With **legacy systems** you often need to build a data-layer on top. With handoffs, you may need to set up data capture, as people may never have thought about this before.

Corporate teams like HR, training, sales and finance have often never counted things around their demand drivers, especially if they have been supply-led (we do what we can with the people we've got). The 'devil is in the detail', but in these areas more detail becomes confusing and a high-level, assumption-based 'what-if' model is the better place to start, as it builds understanding more quickly. Data can be very system dependent and sometimes you need to invest a lot of time to make progress — even more than technology spend. More generally, a data glossary and data dictionary are key tools for making information usable. Data, when you get it, is often a real catalyst for change in how you plan.

Planners as consultants

Getting started is the hardest part and you need the right skills to succeed as an end-to-end pioneer. You need to be not just technical, but also an advocate, to break down siloes. You have to really understand how the business works. You can be easily ignored, until you prove value. External experts can help to **start the change**, as they will have experience to share from elsewhere. We need the confidence to go into new areas knowing that the core planning principles apply really well and that our work can be totally transformational.

In fact, it is remarkable how much similarity planning pioneers see in most stages of the **planning cycle** across very different types of operation, especially strategic budget planning and operational readiness or effectiveness. There are differences, of course, and the language we use, the expectations of stakeholders and the details of operating models are diverse and challenging in different ways. This is why it's a great opportunity for experienced planners looking to pioneer work in new areas.

Data: start with what you have now and build understanding

1. Identify key measures by understanding processes and through discussion. Understand customer experiences, as well as data analysis.
2. Buy-in to new plans is best gained by modelling processes, rather than validation of the individual input values.
3. Explaining what you need information for often uncovers it by a different name, used for a different purpose.
4. A proof of concept can identify the data you need and the value this will add, helping you get the necessary approval.
5. Don't simply apply known, but inappropriate, planning methods. Develop your skills and adapt core principles into new solutions.

Paul Smedley, Founder & Chair at The Forum with Adrian Hawes and Keith Stapleton, Directors at Select Planning and Associate Consultants at The Forum. Get in touch about how we can help you bring best practice ideas to life in your organisation, advice@theforum.social.

Driving improvement in end-to-end processes and back office capacity

Best practice in back office planning offers many of the disciplines that are key to the new digital world as much as the old, as the growth of digital channels creates new tasks and processes. Understand how best practice can be shared and evolved. Find out more.

Successful back office planning teams are a brilliant source of expertise on workflow, process times, managing skills and reducing failure demand (see box) and there are abundant opportunities to spread this best practice across all kinds of end-to-end planning as well as existing back office operations where resource planning is still relatively undeveloped. It's notable that in several areas of the planning cycle, the dedicated back office planning team at **Santander Operations** stands out as Best-in-Class. Looking back 20 years, the back office was an operational culture very distant from the contact centre and not always attractive to up-and-coming planners. Looking ahead however, the rapid pace of digital transformation beckons in a very different future, supported by growing adoption of digital journeys by all kinds of customer, especially post-COVID-19 (see pg 68). It's time to take a fresh look at how we plan for processing operations!

Understand the math

Best practice in planning always starts with 'understanding the math' as they say in the USA. In call centres and face-to-face operations, Erlang and Queuing Theory help you allow for random variability around predictable workload patterns. For planners used to this, the maths of the back office can feel very alien, based as it is on the fact that backlogs can spiral out of control very quickly. If you don't understand statistical and mathematical concepts like exponential growth or compound interest, you will struggle in planning or managing back office and processing operations. You also need to analyse process times and variability (see box) and your capacity planning will be as much supply-led as demand-led, still less common in the contact centre.

Transformation & capacity control

A processing operation needs clear capacity control. To plan for a process, you must know exactly what steps need completing and how this is undertaken. Famous from our earliest training workshops 15+ years ago, the Waterfall Model shows how to prevent backlogs spiralling out of control. With process times, some variability is predictable, some is not: you really need to understand this! Rarely do we stumble on this the first time, but we need it going forwards and there's huge potential in the digital world. Fortunately, there's a wealth of best practice to learn from (see box) and, at The Forum, we can help via learning modules, workshops or consultancy and our end-to-end network for planning pioneers.

Capacity control: best practice in the back office

1. **Visibility.** A live, accurate view of all work will show: new work ('in-tray'), work-in-progress (WIP), pending (awaiting action externally) and late (or in danger of this), with metrics for both operation and customers.
2. **The Waterfall Model** shows when queues may go into backlog and start generating their own work (chasers). Understand tipping points and reassign work priorities to prevent backlogs spiralling out of control.
3. **Workflow processes.** Know exactly what steps need completing and how these are undertaken, both tasks (worked by a person/BOT in one session) and end-to-end journeys (many tasks to complete a case). Show elapsed times (end-to-end) and process times.
4. **Process times.** Analyse actual times for every task, from a workflow system, to predict averages, and potential variability, for planning. Some variability is predictable, some is not, you really need to understand this!
5. **Failure demand.** Often there's a huge amount of failure, but it's invisible because it's not measured, and no-one sits down to talk about why it is failing.
6. **Managing skills.** Words to follow, words to follow. Forecasting and managing speed to competency is key. Knowledge or process management systems can really impact process times.

Many back office case studies focus on the initial transformation that creates eye-catching benefits, as backlogs come under control, and some organisations outsource legacy backlogs to give a clean start for the mainstream teams. Even more crucial is the business-as-usual cycle that prevents future backlogs spiralling. Both stages can be seen at **Legal & General** (pg 38), where the blending of skills from transformation, planning and operations teams has been key. This 'Customer Service Triangle' has created an impressive capacity for continuing change and developed agile working, a mindset that says this is no longer 'office work'. The same challenges occur in other types of operation, as seen in field and branch operations at **Capita PIP** (2019) and increasingly with digital channels and robotics.

Process optimisation

Process optimisation starts with process improvement, often including third party or outsource providers. At **npower** (2020), the new back office quality model uncovered £1.5m efficiencies in year 1, raising customer experience scores by a third, by engaging offshore partners in India and adding key questions to the QA form, to flag up processes not fit for purpose. At **FSCS** (2018), initial transformation led to completing 99% of claims end-to-end within SLA and going digital for 97% of claims within 12 months. With paperless mortgages at **RBS** (2019), a complex end-to-end process moved from 100% paper to 92% digital in 12 months, enabling same-day mortgage offers. This was a WOW factor for customers, the only one of our Innovation Award finalists so far to feature in nationwide TV adverts! The growth of digital channels is creating new tasks and processes, as automation and BOTs proliferate. They generate exceptions or escalations, but without all the initial questioning or checks, of inbound calls or emails. Increasingly, customer questions from a website or mobile app are specific and in context, with all the customer history. More choice usually means more interaction, despite automation, and we need to plan what can be delivered via AI & Robotics or here the human touch is required. Crucially, spot **pinch points**, as people do when optimising a factory line or a project. A critical path is created from understanding dependencies.

Resource optimisation

Resource optimisation is not all about process, however. Understand what drives demand, sometimes complex to forecast, and evaluate operating models to optimise how resource supply matches demand. Model your work types, from case work (eg claims, loans or complex queries) to cyclical tasks (eg billing or renewal) or portfolios (client accounts). Work side-to-side, across organisational siloes, on processes that may require many touchpoints, with calls, visits or evidence gathering. Workers may be skilled professionals, eg medical, underwriting or engineering. They may be in short supply, require qualifications or have a long speed to competency (6 months+). This needs long term planning.

David Preece, Head of Programme Delivery and Paul Smedley, Founder & Chair at The Forum. Contact them onadvice@theforum.social.

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Creating great online journeys and the role of face-to-face service

Is face-to-face part of a wider omni-channel strategy? What is a great online journey? Paul Smedley highlights ways to update yourself with new developments and create a workforce strategy and operating model that can be sustained, for both organisational ethos and costs.

It's easy to think that digital is the future and face-to-face is the exact opposite, but this could not be further from the truth. Omni-channel success (pg 68) comes when we create end-to-end experiences that work well for people. It does not mean 'every channel' but does require integrating digital with all other channels. If you have stores, face-to-face service or a branch network, these needs to be part of your omni-channel strategy, and you can use tools, like the **Four Lens Model** and **Strategy Pyramid** (pg52), to define the purpose of face-to-face within the wider strategy. Planning and insight need to be part of this, so that we help develop an operating model and workforce strategy that can affordably deliver the desired end-to-end customer experience.

Great customer journeys

COVID-19 has demonstrated how much people will use digital channels and work from home, once they have to. In contact centres, we've seen changes in service offering and opening hours, driven by resourcing (supply). This will generate insight into how we can manage demand in the future. We can focus on who can't or won't go online, how we best help vulnerable people and the role of volunteers, delivery networks or local communities. Face-to-face and digital contact fit together as we solve these issues, and you need a clear focus on planning capacity, to match supply and demand cost effectively. So, as we return, step by step, to a 'new normal', how much of this changed behaviour do we want to embed? If we take the initiative, workforce and customer strategies can shape what happens.

This will require changes to our **operating model** and budget plans and flow through the planning cycle. We will need new data, measures and dashboards. We can learn from the retail sector, where businesses face existential challenge like never before. A great online journey for customers (see pg 68) is absolutely critical and there's much to learn in the full online versions of **award case studies** from AA Ireland, Clarks and The Very Group.

Getting started is hardest

Start by going back to basics on each channel, or from scratch in new channel, and learn from a growing body of best practice (see box). Deeply understand what drives demand, and don't just copy a planning or operating model from elsewhere. Evaluate how resource supply matches demand in different scenarios. A pilot can help hugely in new areas, like social media or web/in-app chat, when the volumes are still small. Before you move further, be clear about what you need for capacity planning, discuss assumptions and distinguish resourcing models led by **supply vs demand**. Paradoxically, detail can easily become confusing, if there are questions about what it means, how it's derived or whether it is accurate. Equally, it's good to know where there is no data, as giving visibility here is a potential 'quick win'.
In getting useful data, there are usually many obstacles, so be resilient and learn from success by others.

Paul Smedley, Founder & Chair at The Forum. Contact him at: paul@theforum.social

Six top tips for pioneering end-to-end planning in new areas

1. Show people what they are not currently seeing and how you can help them with this. Keep it clear & simple at first.
2. You need to understand processes to plan for them. Talk with people. Explore alternative models or approaches.
3. Be a data detective! If there's been little planning, data will exist for different purposes and be hard to access.
4. A high-level, assumption-based 'what-if' model is often the best place to start; it builds understanding quickly.
5. Distinguish operations that are led by supply vs demand
6. The start can be hard, you need the right skills to succeed.

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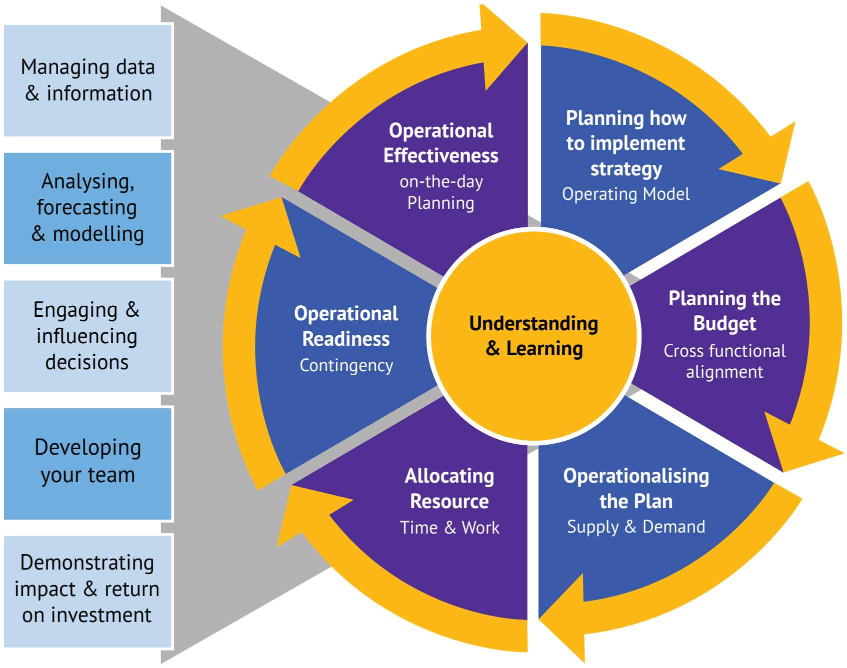
Planning for field operations: optimising routing & regions

Field planning is changing, with huge benefit by softening regional borders or increasing flexibility, from both an efficiency and engagement perspective, and some organisations more supply-led in the way they set appointments



Joined up decision-making makes visible how we deliver for customers (and at what cost) and then drive improvements in how we do this. In 2013, the UK CEO at **DPD** was keynote speaker at our conference. As a delivery company, they stood out for service. They knew where parcels were, when they'd arrive, and customers could track real-time. When they set delivery windows, they knew what it would take (and cost) to deliver that promise. Above all, everybody knew why it mattered and where they fitted in to achieving success.

If we fail to plan, we plan to fail

In 2019, **British Engineering Services** (BES) won our Innovation of the Year Award. They've seen sales double, with a planning-led service reliability capability which is unique in their market. With cost savings c10-15% and 50% reduction in wasted downtime, they've seen a 74% improvement for 'on or before' SLA for the largest clients. In the six years, there are still few organisations using planning to get ahead , but digital transformation, service differentiation and cost effectiveness are now among the top items on the board's agenda and there is growing planning capability to bring about this change.

Flexible routing and regions

Flexibility in a largely fixed cost base was a crucial part of success at BES. Previously **engineer surveyors** had rarely crossed borders, but regions were removed, and drive time radii was adjusted if required, based on demand, in pockets or as part of a national shift of resources into a priority area. **Engagement** through workshops paved the way. Engineers thought they could allocate best, but when given an exercise everyone did it differently. They realised that there was no consistency or best way of working and the automated system soon demonstrated better results.

Although retaining regions, a large-scale **telecoms** operation has gained huge benefit by softening borders, from both an efficiency and engagement perspective. For someone who has already travelled a long way, it can feel easier to just go a little further, over the border, rather than travel a long way to another part of their own region. Surveyors will still phone ahead on their way to jobs and manage those important local customer relationships. Crucially, this was built in, from the budget stage as part of the operating model. It forms part of the recruitment process. This is like multi-skilling in a contact centre; it always works best with flexible boundaries! By contrast, in a smaller **home care** provider, with flexible on-call nurses, regions are a simple way to allocate resource. The opportunity to go outside the region, however, is a key part of the flexible contingency for their Jeopardy Management team.

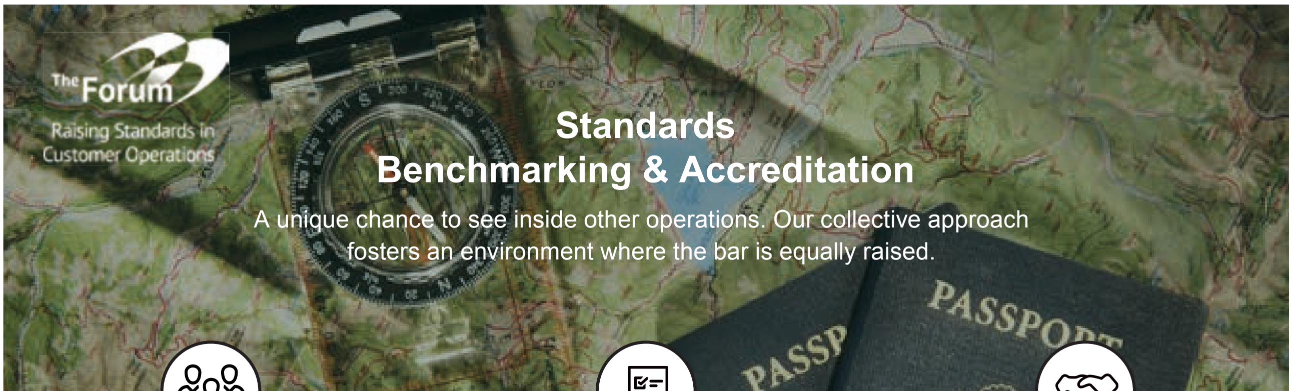
With all change, communication and engagement is key. Gain buy-in first, by setting expectations and explaining your goals early, and look to take on board the suggestions of those affected. Be prepared to **be flexible**, as individual requirements are revealed, and build your routing strategies around workers as well as customers. Do you want to make sure field workers have a short and **easy drive** for their first and last jobs? Or give flexibility on when they go to a local depot to pick up or drop off parts? Build this into their routes to make life as simple as possible.

Learning across many sectors

Good practice can be found in many types of operation, from health visitors to safety inspection or engineering services. Over the years, member case studies have built a strong blend of practical examples. In outsourcing at **Capita PIP** (2019), regional flexibility, as well as leadership and governance, was key to transforming performance on their government contract for benefits assessments. At **Anglian Water** (2018), smarter schedules cut travel time by 9.30 hours, with 42% fewer visits and 78% cut in backlogs. The secret? Bunching work so that preventative maintenance was done while on site. The key to success? Empowering engineers and capturing accurate, complete data. At **Openreach** (2017) empowering engineers and working across patches led to a 17% cut in travel time, and had a big impact on absence too. Decision making was joined up because engineers knew what mattered most to customers and were able to apply their specialist knowledge.

Finally, some operations can be supply-led rather than demand-driven, like at a broadband provider who offers appointments in line with peaks and troughs of staff availability (supply), especially useful in a sparse, rural area. Either way, analyse propensity to fail to prevent issues rather than just react. Include routing principles in your long-term plans and strategies, so that budgets are achievable and assumptions or handoffs consistent at all stages of the planning cycle. This will help to make sure that you can correctly size, and cost, your field workforce. At BES, planning now drives sales and pricing decisions, underpinning profitability and margin. This means sales strategies can be focussed on areas of opportunity where higher capacity can drive costs down. In field operations, price is intrinsically linked to capacity, based on resource availability or the cost of scaling up a skill set, in each place.

Paul Smedley is Founder & Chair and David Preece is Head of Programme Delivery at The Forum. Contact them at: advice@theforum.social



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Planning cycle: resource allocation & training in field planning

This stage of the planning cycle is key for Field Operations and there is much to learn from best practice elsewhere, as our Field network grows, we launch our first Field Planning workshop programme and kick-off a cohort in standards benchmarking for field.

This part of the planning cycle, is very different in Field Operations and may feel alien to planners from elsewhere. The allocation of work is key and travel time, job length and fixed appointment slots each bring specific challenges.

Scheduling appointments & visits

Advanced sight on the day's appointments is important and some members do this well, even with an automated dynamic scheduling system. This is often not true at the initial launch, so be prepared for teething problems and see the engagement process that worked for British Engineering Services (BES, 2019). One company found an initial hit on jobs per day, with new work rules and the automated scheduling. Some members are reviewing shift patterns, to better fit long jobs or home visits outside the normal day. Try fitting 2-hour jobs into a 7-hour shift! Moreover, training (see box) requires scheduling for highly skilled workers who need regular upskilling or updating. This is often not yet bite-sized, virtual or modular, as is in other areas of the business.

It's not enough for the technician to arrive; they also need the right skill (preventing future failures, bunching work) and you need to synchronise multiple plans (equipment or tools, permissions, downtime to inspect equipment in a business or operation). You may need to build jobs for a gang of people or manage physical requirements (parts, access).

The key is to avoid siloes and optimise skills management. It becomes much more difficult and costly to build a resource model around siloed work and ringfenced workers. Make changes as early as possible, since field workers need advance notice of jobs, to pick up equipment or validate jobs with local knowledge. Is it easier to delay jobs than add new jobs? You also need a clear mechanism for requesting changes or marking preferences. For instance, the first and last job is key and local travel considerations might impact where and when vans can go to depot to load equipment (not always at the start of the working day).

Insight: digging deeper

You need to analyse and manage working times, allowing for variability – both predicted and unexpected. Analyse travel and work time separately but allow for them in both long term plans and daily schedules. Some organisations allow slots for contingency – others (like ambulance services) work entirely off un-scheduled demand but have found that demand patterns, in practice, are remarkably stable and predictable. The key to this is careful analysis of the granular data – and therefore data management and reporting is often a pre-requisite for developing schedule flexibility. You need to consider the potential impact of technology: eg mobile technology (for tracking and capturing info), technology for providing information or advice (eg video googles for level 3 experts to engage directly). Above all, you need understanding and a robust resource plan so that the right resourcing decisions are made.

Managing training and other shrinkages

Three members have found benefit in centralising expertise.
At **LNER** (pg 20) on-board training, key to roll-out of new Azuma trains, required co-ordination by regional planners and much flexibility on shifts.

At **Severn Trent Water** (2020 Team Awards), deep understanding of shrinkage drivers has come from centralising the management of this, building new confidence about availability when scheduling gangs, and creating significant efficiencies.

At **OpenReach** (2019), with a new approach designed to support a 50% rise in output by engineers, training capacity was raised 30% through efficiency while requiring 30% fewer planners in the central team.

Jeopardy management: real-time in field, branch or back office

The very best teams are adding insight, are agile and able to react quickly to changes. They feed learning from the day into the Planning Cycle, to inform future decisions, and have operational playbooks or incident management plans in place, helping build stakeholder trust.

Real-time management of incidents, risks and resourcing shortfalls is an essential part of any customer operation. That said, planning teams that are great at the earlier stages of the planning cycle, will reduce some of this 'downstream work', leaving you free to focus on what is genuinely out of your control. The danger is that our real-time or jeopardy teams are set up to work in the old way, so as your strategic planning improves, you need to re-optimise jeopardy management as well. The good news is that there is much best practice that can be applied across every kind of operation (see box) as well as some tricks that are specific to field, back office etc.

Get ahead of the curve

For all teams, **visibility** is paramount; you need to see what people are doing and compare it to plan. Open lines of **communication** are also key to success, both in to and out of the jeopardy management team, so you can give and receive information easily, clearly and effectively. Finally, the best teams are proactive, able to predict and pre-empt difficulties. The best in class teams from our standards benchmarks understand the impact and context of change in their business and the variances form the plan that these generate. As a result, they are now often able to automate key decisions and actions. For all teams, the playbook is key – a way of documenting agreed triggers, actions and escalations – so you know what to do and there is stakeholder trust and pre-authorisation. Our top tip is to automate as much as you can, especially if the human touch adds little extra value.

Changes in field planning

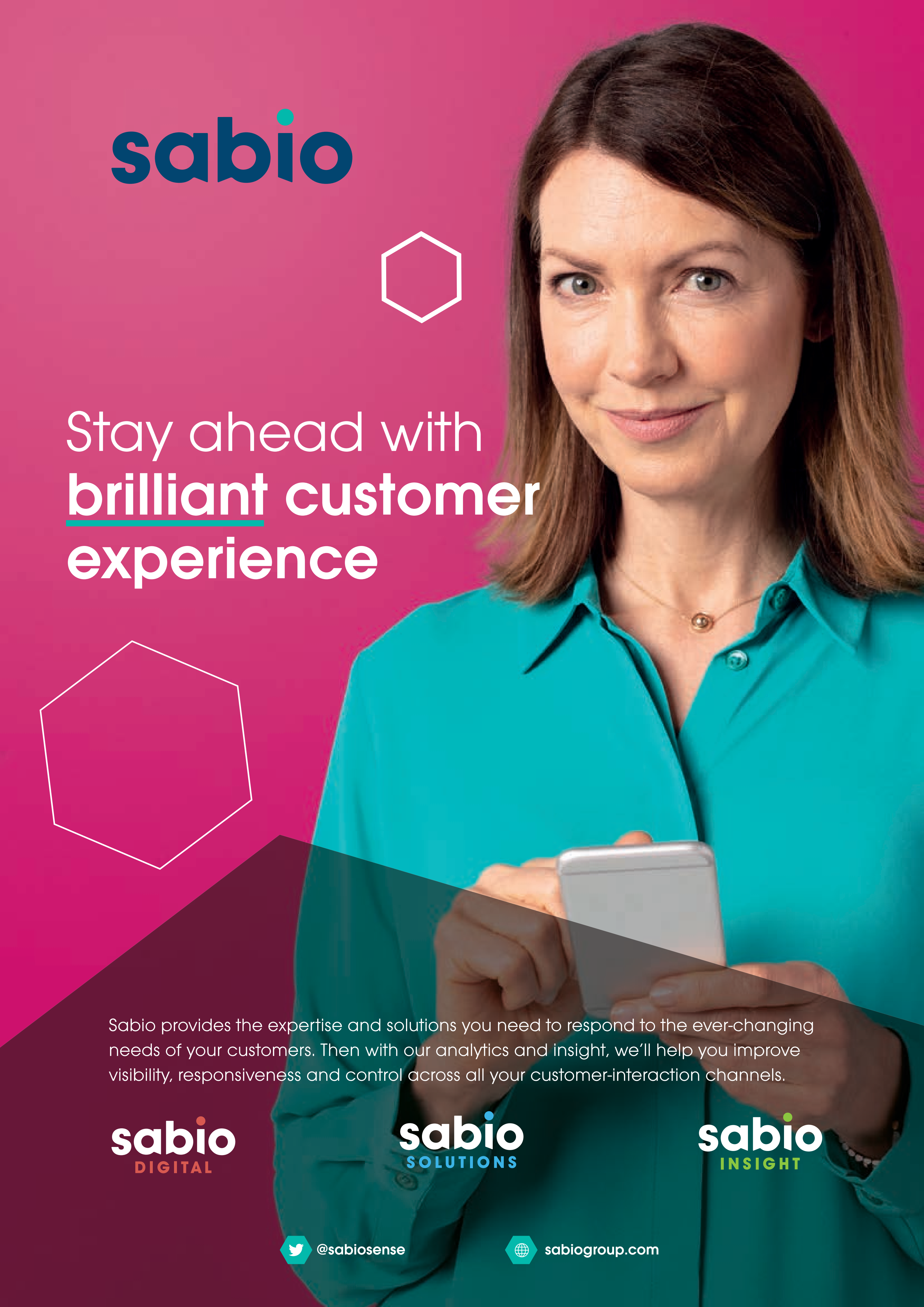
If a field worker is running late, teams typically speak to later customers, to advise or negotiate. All sectors face resource shortfalls, but other issues do vary by sector. In water, there can be complex logistical chains (road closures, gangs, equipment etc) and changes quickly escalate. For home visits (eg housing or security), people cancel or no-show. In all areas, the best teams, like at one telecoms company we visited, make proactive use of their time, to protect customer experience. Automation can transform comms (like delivery companies) and re-scheduling (with workforce management), so be clear what won't change and what needs the human touch. Changes earlier in the planning cycle or operating model will also change what the team does, the way we set service expectations, manage skills or support remote diagnostics and support for instance.

Process management

In back office or processing operations, it is always key to pre-empt backlogs spiralling out of control and to have pre-agreed contingencies, for instance by blending work across skills or departments (front/back/specialists). Reporting in processing operations shouldn't be focussed on the here and now but should be reporting on what is likely to happen next. It's also vital to understand the impacts on process. If there is a delay in completing task X, how will it impact Y and Z. The jeopardy team needs to be able to model and communicate this impact effectively and proactively.

Best Practice in Jeopardy Management

1. **Get ahead of the curve.** Predict and pre-empt difficulties; don't react or firefight. Communication needs to be clear, rapid and robust.
2. **Understand the drivers** of what changes on the day. There will be patterns, so predict and optimise the way you manage each.
3. **Learn to change the plan.** Fix issues that arise earlier in the planning cycle. If the plan doesn't get better, you are not learning!
4. **Incident management.** With IT issues or local incidents, pre-agree the actions and accountability with stakeholders at all levels.
5. **Operational playbooks.** Be prepared to make it quick and easy. Get data quickly, streamline comms, pre-authorise, set expectations.
6. **Automation.** The best teams are now using systems to automate key decisions and actions.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With 17 years' experience in delivering insight and analytics, CACI has experts in demand forecasting. Forecaster is an advanced forecasting tool designed to produce accurate data-driven demand forecasts. Easy to use, yet backed up by a rigorous machine learning approach, it lets you move away from complex Excel spreadsheets and single person dependency. It helps streamline the forecasting process, even across 100s of forecasts. Forecaster helps your analysts move from manual low level profiling, to understanding and exploiting the relationships between business drivers and demand. Whether it's call volumes, handle times, workload, sales, or any other demand metric, Forecaster provides accurate forecasts to help you plan with confidence.

Contact: Neil Griffiths
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Calabrio is the customer experience intelligence company that empowers organisations to enrich human interactions. Through AI-driven analytics, Calabrio uncovers customer behaviour and sentiment, and derives compelling insights from the contact centre. Organisations choose Calabrio for its ability to understand customer needs and the overall experience it provides, from implementation to ongoing support.

Calabrio is revolutionising the way enterprises engage their customers with Calabrio ONE, a unified workforce optimisation (WFO) suite – including call recording, quality management, workforce management, voice-of-the-customer analytics, and advanced reporting that records, captures and analyses customer interactions to provide a single view of the customer, and improve the overall agent and customer experience. Calabrio recently acquired Europe-based Teleopti, a combination that is set to define the new global standard for the customer experience industry. Find more at www.calabrio.com.

Contact: Jonty Pearce
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Call Centre Helper is the leading contact centre magazine with over 200,000 readers. It is a free, weekly online magazine aimed at giving contact centre people advice on how to make their businesses work more effectively

The site allows readers to navigate swiftly to the area that interests them most. There are many regular features including articles that ask experienced people to answer real-life contact centre problems faced by their peers. We aim to be the main source of content on the internet for specialist call centre areas.

We also run a very popular webinar programme which focusses on a wide variety of topics. Along with our chatroom, the webinar provides the opportunity to ask questions, share best practice and interact live with our audience.

Supplier Directory

Contact: Sales Team
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email: sales@ctalk.co.uk

ctalk Rock Solid Contact Centre helps businesses elevate their professional image by identifying and effectively solving current business operational and communication challenges. Not limited to the traditional call centre, the ctalk system is the ideal choice for your Customer Service contact centre; Technical support centre; Sales team; Inbound/Outbound telemarketing; Education/Information support centre; IT helpdesk or Service desk.

Contact: Chris Dealy
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injixo WFM empowers contact centres to facilitate and automate their entire workforce management process. This allows our customers to spend less time and effort on manual planning and scheduling – instead they can focus on what really matters: their employees and customers.

injixo is a product brand by InVision AG and an award winning workforce management platform for contact centres of all sizes. The feature-rich WFM suite helps contact centres to optimise and automate their entire workforce management process from start to finish. injixo covers the full range of functionalities that contact centres need, from forecasting and scheduling to intraday management, reporting and agent engagement. injixo's simple pay-per-use pricing model enables small and large contact centres alike to experience the full power of professional WFM – with maximum flexibility and cost transparency, ultimate scalability and minimum effort.

Contact: David Marshall
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Intradiem arms contact centres with a real-time solution that streamlines operations and builds a solid foundation in a complex environment. The advanced automation platform creates significant and rapid cost reduction and agent performance benefits. Over 230,000 contact centre employees use Intradiem's solution daily.

Contact: Leon Morris
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NICE (Nasdaq:NICE) is the worldwide leading provider of both cloud and on-premises enterprise software solutions that enable organisations of all sizes to take the next best action in order to deliver better customer experience and business results, ensure compliance, fight financial crime and safeguard people and assets. NICE's solutions deliver strategic insights by capturing and analysing mass quantities of structured and unstructured data in real time from multiple sources, including, phone calls, mobile apps, emails, chat, social media and video. NICE can also turn around work from home options for agents in 48 hours with our CXone@home package of benefits at NO cost per agent. Plus NICE's unique Advanced Process Automation capabilities can supplement an existing workforce with a virtual one to ensure business continuity even through difficult times.

Over 25,000 organisations in more than 150 countries, including over 85 of the Fortune 100 companies, are using NICE solutions. www.nice.com.

Contact: Jeremy Gardner
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Pipkins provides innovative contact centre workforce management solutions. Highly accurate, effective hosted and premise-based systems, along with the highest quality support. By maximising contact centre resource utilisation, achieving service targets without overstaffing and reducing administrative overheads, Pipkins' customers regularly achieve a first year ROI. The system works with most contact centre platforms and interfaces to HR and payroll if required.

Hosted is available from both UK and US data centres.

A true wfm innovator, Pipkins has produced many industry firsts including Back-Office process planning since 1984, multimedia queuing since '97.

Contact: Nino Reina
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QStory, based in Guildford, Surrey, is revolutionising the way call centres manage their real time activities. QStory has created an integrated workforce engagement management (WEM) solution to compliment WFM systems and processes with an end-to-end intraday automation platform. It is engineered to improve employee engagement, deliver improved customer experience and reduce operational costs and is deployed in contact centres in the UK, Ireland, Europe, South Africa and North America. Core capabilities of the platform include intraday management, real-time adaptive scheduling, real-time adherence, agent self-service, homeworker support and management, eLearning/meeting and vacation/time-off management. Mobile apps for administrators, managers and agents come standard with the solution. A native gamification module and partner-provided timekeeping/payroll management capabilities are optional offerings.

To find out more visit: www.qstory.co.uk

Gold Sponsor

Contact: Michael Cottrell
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email: info@sabiogroup.com

Sabio Group delivers solutions and services that seamlessly combine digital and human interactions to support outstanding customer experiences. Through its own technology and that of world-class technology leaders such as Avaya, Nuance and Verint, Sabio Group helps organisations to optimise their customer journeys by making better decisions across their multiple contact channels. The group works with major brands worldwide, including the AA, Aegon, AXA Assistance, Bankia, BGL, BNP Paribas, Caixabank, DHL, Essent, HomeServe, Liverpool Victoria, Office Depot, Saga, Sainsbury's Argos, SSE, Telefónica, Think Money and Transcom Worldwide.

For more information visit www.sabiogroup.com or follow us on Twitter at @sabiosense

Contact: Sensee
Tel: 0208 996 5842
www.sensee.co.uk
email: sales@sensee.co.uk

Sensée help leading UK brands – such as Allianz, Bupa and Hastings Direct – improve their business performance, provide brilliant customer service and create accessible careers.

Uniquely, Sensée's award-winning team of 600+ service advisors are employed and work entirely from home – as well as the support & management staff – handling customer service enquiries over the phone as well as via email, webchat, text and social media.

The company's secure working practices mean they are FCA authorised as well as ISO accredited. They are also leading the 'flexible working revolution' – providing technology and consulting to help others release the benefits of homeworking as well.

Learn more at www.sensee.co.uk

Supplier Directory

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SVL Business Solutions is the UK's most experienced provider of multimedia interaction recording, contact centre applications and PCI security solutions. For over 50 years, we have been a trusted partner to contact centres across the UK and Ireland. With a unique portfolio of enterprise, branch office and SMB solutions, SVL Business Solutions works closely with customers in a wide range of industry sectors including contact centres, local authorities, public safety, financial and utilities.

Our comprehensive portfolio of solutions includes:

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- Interaction Analytics
- Workforce Management & Optimisation
- PCI Compliance
- Real-Time Process Optimisation
- Public Safety

Contact: Donna Phillips MICHT MGPBT
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Contact: Verint EMEA
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www.verint.com/gb/
email: info.emea@verint.com

Verint® is 'The Customer Engagement Company.' We help organisations simplify and modernise the way they engage customers through their contact center, branch, back office and marketing departments. Our marketleading broad portfolio of cloud and hybrid solutions is designed with the latest artificial intelligence and advanced analytics technologies to deliver greater automation and shared intelligence that drives real business impact. Verint is your partner to make customer engagement a strategic advantage and a strong competitive differentiator for your organisation. With over two decades of experience helping more than 10,000 organisations worldwide create lasting value, we're a global leader in customer engagement. Together with our vast global partner network, we can help you evolve and modernise your entire customer engagement operation, while protecting your legacy investments. Together with our customers, we're looking to the future—imagining, planning and developing innovative ways to take customer engagement to new heights.

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ZOOM is a market leader in workforce optimization software. The company has received world-class customer satisfaction honors — 90 NPS for 2017, has 2000+ customers, and 300+ partners across 90+ countries. ZOOM's software helps contact centers improve the customer and agent experience — by capturing, analyzing, and improving the quality of all interactions — while addressing back office compliance and risk. ZOOM's customers range from sub-100 agent contact centers to some of the world's largest companies – Marks & Spencer, Finansbank, Cigna, Rostelecom, IBM, Novartis or Saudi Aramco. ZOOM's suite includes call, video, and screen recording with omnichannel quality management, advanced analytics, workforce management, elearning, and more.

Learn more at www.zoomint.com.

Meet The Forum Team

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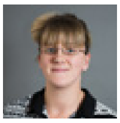

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The Forum's Associate Consultants & Partners

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- Nicola Callan, Director, Boost HR
- Richard Brimble, Director, Understanding & Learning
- Jimmy Hosang, CEO, The Modular Analytics Company
- Sean Northam, Consultant, The Modular Analytics Company
- David Hingley, Consultant, The Modular Analytics Company
- Steve Grainger, Director, S Grainger Consulting
- Alec Bowman, Associate Consultant
- Steve Woosey, Director, Inspire Contact Centre Partnership
- David Davies, Director, Inspire Contact Centre Partnership
- David Naylor, Founder, Humanotics

Become a member at The Forum

As champions of best practice and professional development, we are the 'go-to place' for innovation in customer operations. Membership gains you access to best practice, learning & development and benchmarking resources, with year round support.

Why The Forum?

- Access to independent support and professional expertise.
- The only organisation for teams benchmarking planning & insight, now including field, branch & back office operations.
- Our members span many industries, with regional networks across the UK & Ireland.
- You don't always have to travel; many resources can be accessed virtually. We can come to you.

	Learning Modules	Assisted Learning	In house workshop
Learning Academy Prices	£45	£1,250	*from* £2,500

Best Practice Membership	Personal	Team	Corporate
April Conference (2 Day Place)	1	2	4
National Conference (1 Day Place)	2	2	4
Site Visits		2	4
Access to Leadership Forum			1
Member Support & Networking	Yes	Yes	Yes
Member Resources Portal Access	1	8	15
Member Price from	**£2,700**	**£5,400**	**£9,800**

Why membership?

Membership is your gateway to a community of professionals and provides access to The Forum's programmes and services. Understand trends & developments across the industry, benchmark with your peers, dissect what it takes to implement award-winning innovation. Upskill your teams to engage their colleagues & stakeholders to better meet demands and deliver against vital organisational priorities. We can tailor our approach to suit your requirements.

Four professional communities of best practice

You need never be alone. Join your peers, from all sectors and types of organisation. Keep up to date and learn from best-in-class with networking, benchmarking and learning that is uniquely relevant to your own role.

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Data, Analytics & Insight **Forum**

Quality & Customer Experience **Forum**

Customer Strategy & Leadership **Forum**

Best Practice Membership

The Learning Academy

Standards Benchmarking

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Best Practice Membership

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Our awards give your team a chance to shine and reward them for their hard work

Networking & Resources

Keep up-to-date and open the door to the wider community of specialist professionals

The Learning Academy

Flexible Virtual Learning Modules

Bite-sized specialist knowledge focussed on exactly what you need

Assisted Learning Pathway

Learning alongside a cohort group,supported with a learning journey

In-house Learning Academy

Bespoke workshops & virtual modules tailored to your needs

Standards Benchmarking & Accreditation

Implementing Strategy

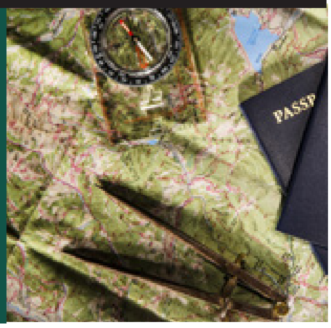
Standards focus on peer-to-peer review and best practice

Operating Model Design

Position yourself in the industry, unique access to learn how others work

Raising Standards

A journey of improvement and accreditation for Planning, Insight & Quality



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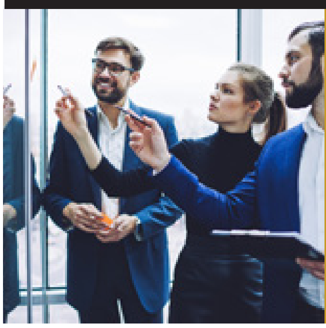

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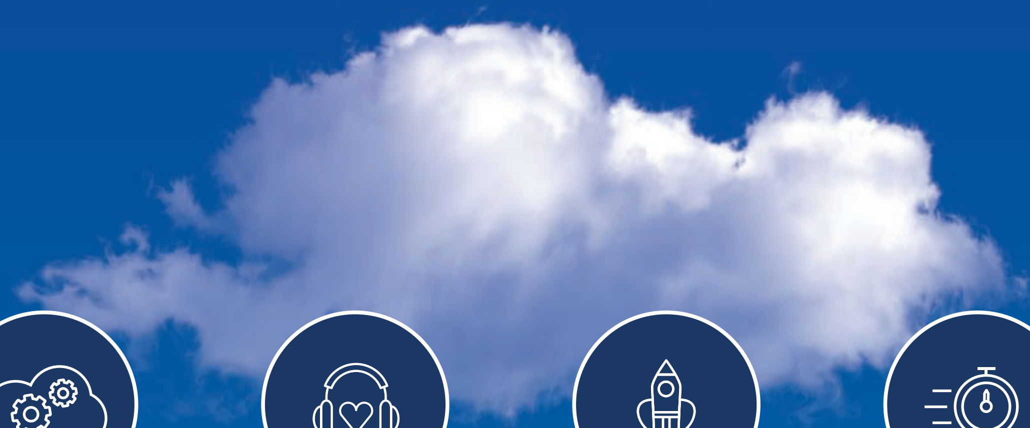

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