



The Client

A leader in providing financial services to the trucking industry, the company had prospered for more than 40 years and rarely used external partners to improve performance. They were privately held, operated in the Midwest and were considered one of the best employer's in town. As a result, it was one of those places where mothers and daughters worked, sisters and brothers, and everyone sort of knows everyone.

The Challenge

The company was interested in reducing cost in the contact center as well as a few back office supporting areas. They were accustomed to delivering exceptional service so they were hesitant to aggressively go after cost savings if they suspected this might in any way hurt service or quality. Considering they didn't use external partners much, there was plenty of skepticism surrounding our first Two-Week Assessment.

The Solution

We approached the Assessment the way we approach all customer engagements – with professionalism and respect for every employee in the company. Our style is very much one of working with frontline staff and leaders to jointly surface improvement opportunities, then using hard-hitting analytical techniques to quantify, dissect and prioritize them. During the Assessment we held daily debriefs with the executive sponsors to share findings and we held midpoint and final reviews with all leaders so there were no secrets. Our promise to all leaders was that their boss would never see anything that we had not already shown them.

During the assessment we interviewed or observed 72 members of staff, spent 224 hours on the floor, identified 53 improvement opportunities and assembled a 16-week roadmap that addressed the 25 most pressing issues and delivered \$1.3M to the bottom line. During the two weeks we discussed the opportunities with the staff and showed them how improvements could be made. By the end of the two weeks, 89% of the team felt if we partnered with them during a Performance Improvement project we could make them 30% more efficient.

Key findings during the Assessment:

- Lack of automated performance management tools and knowledge around WFM disciplines
- Limited use of multi-skilling and call routing functionality native to the ACD
- No clear definition of best practice processes and virtually no adherence to them
- Observations and external benchmarking showed where call handling techniques could be honed
- Rework and cycle time delays in back-office processes led to customer delays and frustration
- Production variances across the departments and excess capacity of 36%

The Assessment provided the insight and roadmap the business needed. We continued our partnership with them for several years after this, performing assessments and leading large-scale change initiatives.

www.marathonpartnersconsulting.com

Surfaced 53 Improvement Opportunities and Developed Implementation Roadmap for Client

Identified \$1.3M in Savings

Established Long-Term Partnership

Results