

## Raising Customer Service Levels of a Shared Service

### Challenge

A major transformation of a Global Retail Bank's Finance function led to the creation of a new central Shared Service Centre, located remotely from the London Head Office. The new Shared Service Centre centralised key finance processes, analysis and reporting from across all operating divisions within the Bank. The residual finance function was focused on partnering with the business providing more insight into decision making with greater involvement in strategy development and execution.

This was a difficult transition exacerbated by concerns about the standard and quality of the service finance received from the newly formed shared service centre. Finance started to compensate for the lack of service by duplicating work that should have been completed by the shared service centre. Efficiencies originally envisaged, were not being realised. After 12 months an internal review identified how disillusioned Finance partners were about the service they received, and how fed up they were with the frustration they felt from their business customers. Customer feedback surveys consistently rated the level of service below target and a number of incidents had meant trust in the service was at an all-time low. The CFO wanted to introduce a 'Customer Service Excellence Programme' specifically targeting Shared Service Centre staff in order to create a consistent understanding of customer service and finance business partnering with the aim of improving capability and standards and increasing the value added to the business.

### Innovative Solution

Our approach was to ensure there was a clear vision and agreement of the capabilities that the Shared Service Centre needed to deliver to Finance and the business. We worked with the organisation's existing competency framework to identify the skills and behaviours that were needed to specifically deliver these capabilities.

**Edge PACE**, a simple online survey tool then engaged the individual, their manager and their stakeholders with the skills and behaviours that were expected and enabled us to create a unique position for each individual on **Edge Map**.

Edge Map provided a quick and effective insight for the Senior Management Team (SMT) into the strengths and development areas for the Shared Service Centre. We worked closely with the SMT to identify the most cost effective people strategies for retention, recruitment and development to improve the service centre capability and ensure resources were focused in the right areas for maximum impact on the business.

We were able to identify from Edge Map a number of key people with the right skills to work on a number of short projects delivering immediate solutions to some of the issues.

While the SMT remained committed to developing a learning journey to improve customer service, they were concerned about cost as well as the time out of the business that would be needed and how this could further impact service levels.

Taking this into consideration we created a targeted 12 month 'Customer Excellence Journey'. Edge Map enabled us to identify who would benefit the most from this training. Each '**Edge Learning Journey**' involved 12 participants and their managers who committed to providing support throughout the learning journey. Each participant committed to developing their skills and identifying opportunity to increase their personal value to the business through improved customer service. The learning contract also committed each participant to delivering and implementing key tools and techniques into the shared service centre and championing customer service.

The journey blended assessment, e-learning, experiential learning, case studies, role plays and forum theatres, 1:1 and peer coaching and project work. There were a number of core elements to the programme which all participants had to attend, but there were also a number of optional elements which enabled individuals to tailor the programme to meet their own development needs and balance their time out of the office.

Each **Edge Learning Journey** started with a 2 day Developing Customer Programme and closed with a project which delivered value back to the shared service centre. The opportunity to practice new skills was key to the success of the programme and feedback was given throughout the journey which enabled participants to embed behavioural changes.

Each participant had their own '**Edge PACE Indicator Report**' which provided detailed input on their potential, ambition, capability and engagement and their own personal development plan to use throughout the learning journey.

At the end of each journey success was measured using '**Edge Pulse**' a unique tool which tracks individual and programme ROI.

### Benefits

Edge Map provided a consistent and easily understood view of skills knowledge and behaviours across different teams within the Shared Service Centre.

Participants on the Customer Excellence Journey benefited from a detailed and personal Edge PACE Indicator 20 page report to enable them to focus on their development in a structured and realistic way.

People strategies targeted the right capabilities to retain and develop within the service centre.

Limited L&D budget was able to be focused in the right areas with the right people for maximum benefit to the business.

Customers and stakeholders acknowledged the level of expertise demonstrated by the Shared Service Centre and noticed significant measurable improvement in the value added to their own business functions.

Within 12 months £200,000 sustainable savings were achieved.

### Quote

*'Edge PACE and Edge Map helped us quickly to look at the whole of the shared service centre capability in a way that made sense and supported our decisions and action planning. We were able to show our customers quite quickly that we could make improvements'* COO Shared Service Centre, 2011.

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