



CASE STUDY

Performance Management – Client Services

“I’d give Major Oak a 5 on a 5-point scale for this project. All of the milestones were achieved on schedule and the project exceeded the financial commitments.” – VP Client Services

CLIENT

Multi-billion dollar fleet expense management and employee credit and debit card provider.

CHALLENGE

Improve work visibility, understand and improve employee productivity, maintain CSAT, and reduce cost.

RESULTS

- Implemented shared services model
- Developed custom application to receive, distribute and track work
- Installed activity-based management performance reports to measure employee productivity and service
- Delivered hard dollar savings of \$465K in 23 weeks and identified additional savings opportunity of \$712K; **total project savings of \$1.2 MM**

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Background

A leader in payment innovation and fleet expense management for 40+ years had a Client Services department with the mission to provide personalized service for high-valued customers. Within the department, client service reps were assigned dedicated accounts and expected to handle virtually all requests emanating from these accounts. More than 90% of customer requests came via email (to individual mailboxes), which was impossible to track for quality, productivity, service or work balancing across the department. As such, leaders had no idea how productive their staff was, if work was distributed evenly or if the desired service levels were being achieved. The company relied on CSAT and complaint calls to measure quality, and client reps to advise them on workloads. Needing to change, but not sure how to, the organization engaged Major Oak Consulting to design and implement a better model.

Project Details

For five months, our team worked closely with the organization to redesign and implement improved processes and management tools for work assignment and tracking. In the early stages of the project, our team conducted 868 side-by-side observations to gain an accurate understanding of key activities and baseline processes. Our team then led several Kaizen events to discuss the challenges with the current-state process and map out an improved future-state design. In the end, a shared services concept was implemented and work was routed through an intake system for logging, assignment and completion. Through observations, we determined the workload in the area was split 40/60 between true ‘client services’ work and basic ‘tasks’ (account maintenance requests that did not necessarily require a dedicated client services rep).

Moving to the future-state design was not easy and required a concerted effort by our team and the client. Obstacles included: resistance from client reps and the sales organization; separating ‘task’ and ‘client services’ functions; developing a customized Case Management Tool (CMT) to support the new process; customer communication; integrating the new processes with the soon-to-be installed Performance Management System; and tackling a host of one-off scenarios that needed to be addressed in the new design.

At the center of the process redesign effort was the development of the CMT, which integrated seamlessly with our proprietary Performance Management System. The CMT was a custom-built application developed by a senior engineer at Major Oak designed to support the new process. Features of the CMT included: SQL Server back end; centralized inbox for receiving emails; logging and tracking of all client requests; automated messaging to customers at various points (receipt, closure, etc.); skill-based pull system using first-in, first-out methodology; turnaround time by activity; management reporting; and an integrated staffing model. In the absence of the CMT, it is doubtful the client organization



CASE STUDY (continued)

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would have taken on such a significant process redesign effort. It was critical to the success of the initiative and sustainability of the new process.

Once the CMT and Performance Management System were installed and the process redesign effort was complete, our expert team of consultants led six weeks of diagnostic sessions with area leaders. Through these sessions, leaders were able to gain the knowledge and confidence they needed to effectively use the new tools and methodologies. In our experience, this level of coaching and one-on-one counsel is needed and well received by frontline leaders who are tasked with managing individual performance, but not always skilled or equipped to do so.

And the project results were significant: CSAT, customer loyalty and net promoter score ALL increased, while cycle time in account set up decreased 67% and unit costs were reduced 13%.

The Major Oak Difference

Our ability to understand the client's needs and match those needs with the right resources and solution enables not only our success, but more importantly that of our clients. This engagement required a combination of process excellence, performance management, change management and rapid application development. We have completed 400+ projects since our inception in 2004 and no two projects have been the same; however, we can confidently state we have met or exceeded our clients' expectations on every single one.

At Major Oak we are passionate about helping our clients realize improvements in cost, quality and service, and committed to those outcomes.

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