



## CASE STUDY

# Process Excellence

*“The team members that worked the project were extremely knowledgeable and we were able to implement the changes ahead of the projected schedule.” - VP Customer Service financial services firm*

### CLIENT

Leading Information Management and Business Process Outsourcer with a contact center with annual call volume of 15 million and 4,000 seats.

### CHALLENGE

Quality scores across the network were very good; however, management felt soft skills fell short of desired world-class standards.

### RESULTS

- Benchmarked the center against ten renowned quality programs to find:
  - 92% of soft skills criteria used by these companies were in place
  - Quality culture here was equal, or superior, in all measurable aspects
- Isolated key quality opportunities to be: (a) scorecard design and (b) leniency in scoring; both concealed coaching opportunities, thus prevented the quality program from fully supporting world-class improvement efforts

Major Oak Consulting  
65 South Street, 2nd floor  
New Providence, NJ 07974

908-771-5500  
866-747-2738 fax

info@majoroakconsulting.com  
www.majoroakconsulting.com

### Background

Our client, a leading global provider of information management and business process outsourcing intended to leverage its superior reputation to drive top-line growth. A strategic goal in 2010 was to win the JD Power Award for service excellence. Savvy to appreciate the importance customer satisfaction plays in this honor AND the continued success of the company, our client turned its sights inward, always committed to improved customer experiences. All measurable indicators were positive (quality > 98%; customer satisfaction > 80); however, our client genuinely believed the quality assurance program could do a better job of surfacing agent coaching opportunities. The potential improvements would inevitably lead to more consistent service delivery and improved customer satisfaction. In this context, Major Oak consultants were retained.

### Project Details

Leveraging 15+ years of contact center experience, the consultants at Major Oak relied on their vast network of comparable clients to produce a culture changing benchmark analysis, clearly isolating limitations in our client's current quality assurance program. The study showed the company was actually evaluating all the right measures, just in a way that was at times subjective, encouraging a 'close enough' attitude. The Major Oak team designed and piloted a new scorecard, modifying fewer than 4% of the current measures, but structuring the scorecard more effectively. A comparative analysis was conducted using the current scorecard and modified scorecard. The results pinpointed previously masked improvement opportunities in the areas of 'appropriately responds to customers needs', 'effective use of holds and transfers' and 'call closing'. Suggested modifications were made with minimal impact to existing processes while greatly increasing the Quality department's value proposition.

### The Major Oak Difference

Major Oak Consulting has led process re-engineering efforts both large and small, across contact centers ranging from 30 to 4,000 agents. For this engagement, our extensive network allowed us to specifically benchmark detailed quality aspects and make specific comparisons providing a bridge from high performer to world class. **Major Oak prides itself in first understanding the issues and then working with our clients to design the most fitting solution.**