



## CASE STUDY

# Performance Management – Front/Back Office

*“It was a pleasure to work with the team from Major Oak. I would absolutely work with them again...”*

### CLIENT

Multi-billion dollar fleet expense management and employee credit and debit card provider. One specialty group processes permits for truckers for 48 states. Permit turnaround time is crucial for customers.

### CHALLENGE

Improve service levels, reduce turnaround time, improve management discipline and reduce cost.

### RESULTS

- Implemented enhanced call routing using existing ACD features
- Implemented a multi-team approach to support phone and non-phone work
- Maintained service levels while reducing turnaround time 34%
- Delivered hard dollar **savings of \$650K** in 18 weeks

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

908-771-5500  
866-747-2738 fax

[info@majoroakconsulting.com](mailto:info@majoroakconsulting.com)  
[www.majoroakconsulting.com](http://www.majoroakconsulting.com)

### Background

A leader in the area of payment innovation and fleet expense management for more than 40 years relocated a specialty group from a satellite office to corporate headquarters. The new group had been unable to match the performance of the remote facility and was having difficulty managing phone and off-phone workloads. The client executive team wanted to better leverage existing technology already in place and implement best practices in performance management, call routing and process design. Faced with this challenge, the organization engaged Major Oak Consulting to lead an 18-week performance optimization initiative in the Permits department.

### Project Details

Our team worked closely with Operations to identify capacity in the group and determine the optimal structure to manage that capacity for phone and off-phone work. Major Oak partnered with supervisors, managers and senior managers to develop the workflow plan, implementing a disciplined approach to manage the floor and work through implementation and change management. Additionally, changes were made to the phone system to segment priority and non-priority calls. Major Oak developed a structured, multi-skilled agent pool being flexible enough to move between phone and non-phone work quickly and systematically. In conjunction with these management and operational changes, Major Oak added the Permits area to the state-of-the art integrated performance management system installed in a previous engagement at the client site. Following implementation of the operational changes and the performance management system, Major Oak conducted six weeks of leadership and staff training to ensure a complete understanding of the new methodologies and management tools and to ensure compliance and long-term sustainability.

**The results were significant:** Turnaround time (a critical client metric) was reduced 34%, while unit costs were reduced 15%.

### The Major Oak Difference

Our discovery methodology and seasoned team allowed us to quickly pinpoint the obstacles preventing the center from delivering world-class service at a competitive cost. Once the roadblocks were clearly understood, our change management expertise allowed us to work seamlessly within the organization to communicate and implement the desired change. **At Major Oak we are passionate about helping our clients realize improvements in cost, quality and service.**