CASE STUDY: A&G
The old ways of managing a contact centre team might have been acceptable once, but time has moved on.

Call Design customer Auto & General (A&G) came to this same decision in 2017, realising that its workforce planning needs could not be met by their system of the time. After all, in a fast-moving, technology-driven world, it’s important for businesses to be flexible in order to keep up.

In this case study, we explore some of the challenges the team at A&G were able to overcome, why they chose Call Design, and how their move to a more optimised system has worked out.
BACKGROUND

A&G has a big team across several locations. Though its workforce planning team is centralised, the company has six different contact centres providing insurance across various channels, in addition to sales, customer service and insurance assessing teams. This means, all totalled, there are about 850 consultants working for A&G, all of which require fast, accurate forecasting, scheduling and real-time queue management.

Unfortunately, as A&G’s workforce planning senior manager Fiona Booker explains, the company's old system just couldn't handle the load anymore. A&G had been using the same software for about 10 years, and they were struggling in four key areas:

FORECASTING

At the beginning of 2017, staff were completing about 90 per cent of their forecasting outside of the internal system - in Excel - which was tediously manual. Because the process was so time consuming, it meant that their forecasting was largely reactive and potential opportunities were sometimes missed.

SCHEDULING

Workforce planning is as much an art as it is a science. But, as Ms Booker tells us, A&G's system at the time was about 99 per cent art and 1 per cent science. Staff were manually eyeballing requirements, trying to figure out by hand where they could best schedule consultants.

LINE OF SIGHT

One of the challenges was that consultants and their team leaders had no visibility of their actual performance, says Ms Booker. Her team wanted to provide deeper insights to the operation’s manager, team leaders and consultants, but were unable to so with the functionality available to them at the time.

ANNUAL LEAVE APPROVAL AND PAYROLL INTEGRATION

Previously the company's annual leave and payroll systems involved a lot of manual processing by the workforce planning team, which meant that staff would sometimes have to wait several days for their leave to be approved.
SO A&G TURNED TO CALL DESIGN

Ms Booker and her team knew it was time to automate, and that’s where Call Design came in. As one of Australia’s most trusted suppliers of workforce optimisation solutions, our team was able to work closely with A&G to implement a plan that would lift the burden of large-scale Excel use from their shoulders.

Aspect WFM is one of the world’s leading contact centre tools. It has advanced real-time forecasting and scheduling modules and a very easy-to-learn user interface - this makes it ideal for companies like A&G looking to automate key business functions.

Staff are now able to access the platform outside of the office to apply for leave and have it approved immediately so that they can get on with booking flights and planning their holiday.

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ADHERENCE
Ms Booker's team benchmarked staff adherence with the new system versus A&G's old scheduling methods, and found an 8-10 per cent rise on average. You see, Aspect doesn't just produce another black and white report with numbers, but displays the necessary information in real time and in a visually pleasing manner, encouraging staff to use it.

Everyone, including the agents themselves, can see an accurate top-line view of what consultants should be doing, and a bottom-line view of what they are doing without needing to be an analytical genius.

SCALABILITY
Once, scalability at A&G was, as Ms Booker puts it, a nightmare. It was time intensive, so she could only focus on the biggest, most important areas of business. Now she and her team have the opportunity to look at smaller cues and test out potential opportunities.

For example, they have never previously had the capacity to properly look into the resource requirements of their outbound contact centres. Now there's a resource dedicated to exploring and supporting exactly that.

ONBOARDING
When a contact centre uses highly manual processes, training new staff is as time consuming as everything else. It can make succession planning a challenge, and training costs high. Now, outgoing staff are able to very quickly brief their replacements on required process and walk out the door within a week - the system is that simple to use.

HOW ARE THINGS LOOKING NOW?
At time of writing, A&G has been utilising Aspect WFM for just over four months, and already there's been a huge difference, says Ms Booker. The optimisation transition began in May 2017 and ended in June 2017, and now 90 per cent of A&G's forecasting is done in-system - and Ms Booker is confident they can get the remaining 10 per cent in there, too.

Her team ran a recent benchmark test to compare manually created schedules versus Aspect WFM's in-system versions. The results showed a 20 per cent improvement, without Aspect requiring any significant effort to use.

And where else has Ms Booker seen improvement?
WORKING WITH CALL DESIGN - MORE THAN JUST A PRODUCT

Ms Booker stresses that working with Call Design is about more than just purchasing a new product. Call Design is a partner, not just a seller, and the team and the staff at A&G got off on the right foot right from the beginning.

When initial discussions began, our experts worked closely with Ms Booker to educate other members of A&G on the benefits of workforce optimisation, and the very real results they could gain from Aspect WFM. This helped Ms Booker gain buy-in from the right people, so Call Design could begin the important work of optimising their operations.

Call Design also offers training on all of its products, as well as a 24-hour help desk, which Ms Booker says has been incredibly helpful so far. When the A&G team were staying late after work to help test systems after staff had gone home, there was always a friendly professional available to ask questions.