

Fortis Insurance achieves 96 % first call resolution rate with Change Management from Teleopti



Fortis Insurance's contact centre underwent a major change, further to the insurer having successfully secured a 10-year partnership with Age Concern to be its insurance solutions provider. The insurer's contact centre needed to fundamentally change from one that dealt with insurance brokers (Business-to-Business) to one capable of delivering in-depth sales directly to customers. As the average age of Age Concern customers is 70, call times increased dramatically from three to 15 minutes. Concerned with the potential impact on morale and working practices, which could have led to a reduction in the call centre's efficiency, Fortis decided to restructure its business processes and enlisted the help of one of Teleopti's Improve consultants in advanced deployment using its workforce management software.

"The choice was simple", said Robin Challand, Customer Services Manager at Fortis Insurance. *"We had already installed Teleopti's software solution for workforce management, Teleopti CCC, in the contact centres and were*

very pleased with it, so the decision to ask Teleopti to help us on this change programme was easy – it was a natural extension of our relationship."

With the reorganisation, the call volumes went down to 450 000 annually, but each call demanded more time, more resources and a new set of skills from the agents.

"We had a few things working for us", said Robin. *"First of all, we have a very flat management structure, so I was able to make quick decisions with my team to drive change. Secondly, we were working to tight timescales, so had to take some bold decisions. Finally, we have a 'best practice' forum within Fortis that gives users a voice, which is particularly important during a change process."*

"To really make use of Teleopti CCC, you often need to adapt the way you work and finely tune your business processes", said Maureen Lundgren Gomes, Change Management Consultant at Teleopti Improve. *"Robin is a great motivator who gets buy-in from his co-workers. I just had to get him to see the new possibilities that could lead to increased efficiency and increased staff satisfaction. To make any change successful, you need frankness, creativity and an understanding of the present situation from consultants like those at Teleopti Improve."*

"One thing that we introduced was Teleopti CCC to measure and analyse the business", said Maureen. This means that Teleopti CCC is used as a management tool, enabling managers and staff to see how the unit is performing through the use of key data. To make this possible, it was imperative to get buy-in and ownership of the solution at management level."

One of the main advantages of the change in the management process was increased service levels in the contact centre. Two months after the process was initiated, the level of enquiries that were answered by agents at the first call was up to over 96 per cent, a remarkable figure. The change process started with a simple question: *"How can we improve?"* This led to open and honest discussions

between Fortis and Teleopti Improve. Subsequently, the contact centre processes were analysed and every task was broken down vertically into detail.

Finally the processes were re-engineered and the contact centre was reorganised with Teleopti CCC being used to continually analyse and measure the workplace, ensuring that performance was constantly maintained after the initial eight week phase.

"There have been three main benefits following the change programme", comments Robin. Firstly, there is an increased

level of trust among everyone that works in the contact centre. Secondly, we are able to deliver much higher levels of service and we keep on improving. Finally, we are a much more effective and streamlined business unit. Maureen has played a very important part in this process. She has been very supportive, straightforward, honest and open. This change programme has enabled us to maximise the investment, which we have made in Teleopti CCC and made it an integral part of our business management process."

FORTIS

Fortis is an international financial services provider engaged in banking and insurance. They offer their private, business and institutional clients a comprehensive package of products and services throughout their own channels, in collaboration with intermediaries and through other distribution partners.

With a market capitalisation of EUR 39 billion, Fortis ranks among the twenty largest financial institutions in Europe. Their sound solvency position, their presence in 50 countries and their dedicated, professional workforce of 58,000 enable them to combine global strength with local flexibility and provide their clients with optimum support.



Teleopti is one of the world's leading providers of solutions for strategic workforce management in contact centres. Teleopti is known for developing advanced, user-friendly products based on customer needs.

Teleopti helps clients attain the best possible benefit from investments in multi-skill, multi-site contact centre solutions. Superior flexibility regarding forecasting and scheduling with respect to European legislation enables optimal planning. Functions including real-time follow-up, holiday planning and web-based tools mean that all parts of the organisation attain increased customer satisfaction, diminished personnel costs and lower staff turnover.

Teleopti CCC is also available from a network of partners around the world. Hundreds of enterprises throughout EMEA and APAC rely on the solutions from Teleopti to improve operating efficiency and service levels.

Teleopti, established in Stockholm, Sweden 1992, also has offices in London, Oslo, and New Delhi.

For more information about Teleopti visit www.teleopti.com