



CASE STUDY: LARGE FINANCIAL SERVICES ORGANIZATION

INDUSTRY

Financial Services

COMPANY BACKGROUND

A full-service financial institution with a broad membership base of more than 130,000 members nationwide, including employees of many of the largest firms in the high-tech, manufacturing, pharmaceutical, legal, and service industries

KEY OBJECTIVE

To improve the efficiency and effectiveness of the call center, and to develop the skills of inexperienced call center management staff



CLIENT CHALLENGES

- Needed an effective planning process to help managers migrate from a reactive culture to a planning culture
- A review of call center performance metrics to improve service levels and customer satisfaction
- Required assistance setting up a culture to align with the organization's aggressive growth plan



ICMI SOLUTIONS

- Developed a staffing model methodology that accurately identified workload and staffing requirements, and provided an effective tool for communicating with executive-level management
- Trained call center management on the critical key performance indicators (KPIs) and how to use KPIs to effectively manage the center, as well as overall skills enhancement training.