

## Process Improvement/Knowledge Management

# Implementation of a Fully Searchable Online Reference System



### *Financial Services*

#### **The Client**

TBD Consulting's client, a Fortune 100 financial services firm, faced challenges in their business credit card operation. First call resolution and associated customer service ratings were not up to the company's high standards for this crucial segment of their business. While successful CSRs were required to master multiple complex procedures to excel in their work, the call center was struggling to get accurate procedural information to those frontline representatives. Training was taking a long time and CSRs were not retaining the large volume of information learned during training. Employees were becoming frustrated with the obstacles in their work. The firm turned to TBD Consulting to determine the reasons for the deficiencies and to resolve them.

#### **The Issues**

TBD's consultants performed a front-end analysis to identify the root cause of the challenges facing the call center. The team conducted interviews and focus groups with frontline employees, team leaders and senior management. TBD examined the organization's strategic performance goals and the players in the achievement of those goals. They then strove to identify the initiatives that would best address those goals and to the specific audience. The objective was to identify the combination of curriculum and delivery methodologies that would deliver the appropriate solution. The following are some of the issues uncovered:

- When addressing customer calls, emails and letters, CSRs rarely used the combination of paper and online documentation that was available because they doubted its accuracy. Furthermore, the online system was not easily searchable, so the agents were skeptical about the possibility of quickly finding necessary information. In many departments, procedures were incomplete or out-of-date. As a result, CSRs were not consistently using the most up-to-date documented best practice to address customer issues.
- Procedures were written using an inconsistent style making it difficult for an agent to quickly locate information within a procedure. The existing procedures were created using different templates and versions of Microsoft Word. This variation made the conversion process to an online reference challenging since the document formats were incompatible.
- Different areas within the corporate card operation performed the same task in different ways. Without a consensus on the best practice, it was difficult to hold representatives accountable to a consistent standard.
- The existing electronic procedure manual organized procedures according to department. Some procedures were shared by different departments within the card operation. CSRs were unable to access procedural information from another department and were therefore unable to use all the tools necessary to perform their job.
- When procedures changed, it took significant time to publish the revision on the existing online procedure manual. The card operation had to send changes to another facility

across the country. Uploading the changes took up to a week. Given the time lag, it was impossible to publish timely announcements or training flashes.

- New employee training was focused on teaching CSRs how to perform a large number of tasks. Given the volume of information, agents struggled to retain sufficient knowledge to perform their job effectively. Due to the length of the training, it was costly to the organization.

## **The Solution**

Based on the issues uncovered in the front-end analysis, it was clear that the business credit card operation needed a greatly improved online reference system with up-to-date best practice content. TBD Consulting's staff used a wide range of skills to deliver that solution.

TBD Consulting IT professionals customized our TBD Online Reference System (OLR) to meet the needs of the organization. As a fully searchable, web-based OLR, the system facilitated links both within and between documents so agents could seamlessly move from one procedure to another as they handled calls. And because the users helped to define the system's customization features and named their system, usability was 100% upon launch.

To ensure that the content was current, TBD's information developers worked with frontline subject matter experts to develop process maps with the latest best practices. Those maps went through a management review process to ensure the identified best practice integrated with overall corporate initiatives and with other departments. Each task was assigned a difficulty, importance and frequency rating that would later be used when TBD or the client's personnel developed training.

Once the maps were complete, TBD overlaid that best practice with any related procedures in the existing electronic procedure manual or hard-copy manuals. If a process map documented a task that did not have an existing procedure, TBD documented it. If the existing procedure did not represent best practice as identified in the map, TBD documented a new procedure and advised that the existing, outdated procedure be eliminated. TBD's information developers integrated different approaches documented for different departments so one best practice was in place. Existing procedures that represented best practice were converted to a consistent style and uploaded to the online reference system.

TBD wanted the client's personnel to be self-sufficient in the maintenance of the online reference system. To avoid representatives again losing confidence in the system, it was imperative that it be kept up-to-date. TBD trained client personnel to process map and to use the Arrangement By Design® (ABD) software to document procedures in a style that was consistent with the documents uploaded to the online reference system. TBD also taught training department personnel to upload documents, announcements and training flashes into the system.

Training designed around the online reference system taught new CSRs to find information rather than to perform a large number of routine tasks. TBD's instructional designers used the difficulty, importance and frequency ratings identified during mapping to pinpoint the most crucial procedures that needed to be taught during training. For example, CSRs would be trained to perform difficult procedures with a high consequence of error while for a simpler procedure that was less crucial and rarely performed the CSR would simply rely on the

procedure. TBD's instructional designers encouraged the client's training department to adopt a similar approach.

### **The Business Impact**

TBD's client was pleased with the results of the project. They were able to streamline training which represented a significant cost savings. Since agents were able to reference accurate procedures on the job, retention of skills and knowledge acquired during training substantially increased. The new system includes documentation for departments and tasks not represented in the old system while the overall number of documents was reduced. All procedures are current and the client's training department is skilled in keeping them up to date. Employee satisfaction with the new system is high, so representatives routinely use it, which was not always the case with the old system. As a result, the organization more consistently uses best practices ensuring both efficiency and quality in the handling of corporate card customer requests. First-point-of-contact resolution and therefore overall customer satisfaction have significantly increased with the implementation of the online reference system.

For details on TBD Consulting's complete range of services, call our corporate office to speak to a performance consultant or visit us at [www.tbdconsulting.com](http://www.tbdconsulting.com).