

# Client Success Story

Workforce Management & Process Improvements



## EXECUTIVE SUMMARY

### Company:

A nationwide insurance company

### Challenges:

Work is focused around disaster recovery

Looking for a way to structure the operation to improve efficiencies

In need of workforce management processes

### Solutions:

Establish a workforce management team

Make adjustments to the 800 telephone number numbers and menu

Consider all alternatives to opening a third contact center

Reorganize groups based on licensing constraints

Create a planning culture

Explore creating a historical-based, weather-event forecasting model

Develop a 'Service Level Recovery Plan'

Eliminate overflow and voice mail from inbound queues

### Results:

Anticipated savings:

- WFM: \$2 million annually
- Overall: \$14 million

## Background & Challenges

ICMI's training group delivered multiple contact center training courses to a nationwide insurance company. The client was very pleased with the training and referred ICMI's consulting group for an engagement with another division of its company. This follow-on work lead to a multi-site assessment of the company's disaster claims division.

A majority of the work this call center handles is focused around disaster recovery. The work takes place in a highly dynamic environment, generally around natural disasters caused by weather. Employees within the call center are required to quickly help customers in the wake of a disaster.

The client was routing call center calls to segmented work groups in two separate sites. They were looking for a way to structure the operation to improve efficiencies. In addition, due to insurance licensing issues, the company needed to ensure that the employees were answering calls only for the states for which they were licensed. The client was in need of workforce management processes.

"We understood the delicate nature of our clients business. Ultimately, much of their work is centered around assisting policy holders, in the middle of a natural disaster. In this critical time in their lives, when a policy holder needs our client, we have to ensure the call is routed accurately and efficiently to the right person that can assist them and ensure the process takes minimal time and headache."

— Brent Haferkamp, Sr. Consultant, ICMI

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## Workforce Management & Process Improvements



## Solutions

ICMI collected historical data as well as forecasting and reporting information and made the following recommendations:

- ▶ Establish a workforce management team
- ▶ Make adjustments to the 800 telephone number menu, to improve customer experience and while ensuring the call reaches the appropriate person
- ▶ Consolidate 800 telephone number numbers, as much as practical with current technology and design the menu to be used by both agents and policy holders
- ▶ Fully consider all alternatives to opening a third contact center to handle seasonal peaks
- ▶ Reorganize groups based on their licensing constraints
- ▶ Create a planning culture within the operation
- ▶ Identify what reporting information can be extracted from the telephone system and claim solutions to assist in forecasting future workloads
- ▶ Establish a core Workforce Management team with analysts having significant prior workforce management experience
- ▶ Explore creating a historical-based, weather-event forecasting model
- ▶ Develop a 'Service Level Recovery Plan'
- ▶ Develop Workforce Management processes than includes workforce management technology
- ▶ Reduce workload by eliminating overflow and voice mail from the inbound queues

Additionally, ICMI recommended the technology that the company should implement. ICMI continues to work with this organization on a case-by-case basis to ensure that the recommended changes are implemented effectively.

## Results

It is anticipated that this organization will save millions of dollars, just in the first year, as they follow the prescribed recommendations outlined during the consultative engagement. Further, the organization will realize more effective workforce management efforts, and they will see an optimization in core contact center processes, which will yield significant, cross-team organizational improvements.

“After we completed a full assessment of the business we determined that the company needed to embrace workforce management processes to help improve efficiencies. We are confident that once our recommendations are implemented, the service within the contact center will improve dramatically and the company will be able to reduce costs significantly.”

— Brent Haferkamp, Sr. Consultant, ICMI

ICMI is the leading global provider of comprehensive resources for customer management professionals — from frontline agents to executives — who wish to improve customer experiences and increase efficiencies at every level of the contact center. ICMI's experienced and dedicated team of industry insiders, analysts, and consultants are committed to providing uncompromised objectivity and results-oriented vision through the organization's respected lineup of professional services including:

▼  
: **Resources & Insight:**  
: Your source for the most  
: relevant and independent  
: industry news, interactive  
: forums, research, webcasts,  
: and other dynamic customer  
: management content

▼  
: **Training & Certification:**  
: Highly interactive classroom,  
: onsite, and live virtual  
: classroom training programs  
: with educational resources for  
: continued learning

▼  
: **Events:**  
: More than twenty years of  
: cutting-edge and practical  
: content, insightful industry  
: experts, and productive  
: networking opportunities

▼  
: **Consulting:**  
: Industry veterans helping  
: customer-centric companies  
: make powerful, lasting  
: improvements to their  
: customer experiences —  
: and the bottom line