



contact center performance and consolidation assessment

A large (\$18B revenue) U.S. financial institution had developed a strategic plan to aggressively grow its consumer mortgage sales organization, principally through acquisition. Over a two-year period the company made three acquisitions, which left it with five loan sales and support operations in three different states, including multiple contact center operations.

With the acquisitions completed, it was recognized that the long-term performance of their mortgage loan business would rest on the successful integration of the new organizations and the adoption of leading practices and technology throughout the mortgage sales organization.

Technology Consulting Associates, LLC (TCA) was hired to assess the contact centers and develop a plan for improving their efficiency and effectiveness as a single national organization.

vision

TCA customized a five-step approach for the engagement:

Process	Objectives	Milestones	Tools & Techniques
Plan	<ul style="list-style-type: none"> ✓ Set timeframes and budget ✓ Define and communication project expectations ✓ Establish communication framework 	<ul style="list-style-type: none"> ✓ Project team identified ✓ Final approval of project scope, budget, resources, and timeline 	<ul style="list-style-type: none"> ✓ TCA FRAMEWORK Methodology ✓ Joint requirements planning sessions
Prepare	<ul style="list-style-type: none"> ✓ Ensure efficiency and effectiveness of the project 	<ul style="list-style-type: none"> ✓ Contact Center Organization Assessment Forms and Tools Prepared ✓ Finalization of gathering process and participants 	<ul style="list-style-type: none"> ✓ TCA Contact Center Organization Assessment Templates ✓ TCA Project Management Toolkit
Gather	<ul style="list-style-type: none"> ✓ Detail current operations organization structure, responsibilities, and processes ✓ Determine business requirements and key measures 	<ul style="list-style-type: none"> ✓ Data acquisition complete ✓ Mid project review with client sponsor 	<ul style="list-style-type: none"> ✓ Interviews ✓ Questionnaire(s) ✓ Internal Company Documentation ✓ External Organization sources
Assess	<ul style="list-style-type: none"> ✓ Determine efficiency and effectiveness of current operation in supporting business goals and the customer 	<ul style="list-style-type: none"> ✓ Financial assessment complete ✓ Function and process assessment complete 	<ul style="list-style-type: none"> ✓ Benchmark information ✓ External studies
Complete	<ul style="list-style-type: none"> ✓ Develop understanding of organization opportunities and reducing risks 	<ul style="list-style-type: none"> ✓ Organization opportunity inventory and definitions complete 	<ul style="list-style-type: none"> ✓ Joint optimization planning sessions ✓ Improvement opportunity analysis

results

The project produced a baseline, assessment, vision, and implementation plan for the operation covering the following areas:

- Organizational Structure
 - Organizational Model

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experience

- Layers and Span of Control
- Roles and Responsibilities
- Contact Center Technologies
 - High-level Technology Utilization
 - ACD Systems and IVR Systems
 - Contact Management
- People and Processes
 - Hiring and Training
 - Time Management
 - Performance Management Standards

Over twenty recommendations to improve the efficiency and effectiveness of the multi-site operation were made. Each recommendation contained a ranking, a description and high-level estimates for duration, effort required, and client representative responsible for implementation.

value

Executive management embraced the project's findings and initiated the recommended implementation plan.

During the twelve-month period following the project, the company took the following actions:

- Consolidated one of four contact centers, which reduced cost overhead by 25%
- Restructured the compensation model to standardize performance incentives across the organization
- Standardized the criteria for evaluating individual and group performance across the entire organization
- Selected the legacy application from one of the recently acquired companies to be the application standard for the new national operation
- As a result, the new organization met or exceeded each of its performance goals