

# Innovation Awards

## Completing the nomination form: examples and guidelines.

Use the examples in this document to save you time in completing the nomination form and make sure that the good points of your work are fully considered during the shortlisting process in November/December.

### **Save yourself time.**

Look at 2 example nomination forms, which show how information can be presented so as to save you time (by avoiding the need to write *War and Peace*) and yet make sure that your good points aren't overlooked.

They are not intended to be perfect nomination forms, but to illustrate the kind of information that judges look for. They are compiled from different nomination, with information altered for reasons of commercial confidentiality.

Case studies from finalists for the last 8 years can be found in the awards section of The Forum website. These demonstrate the wide range of initiatives that are put forward for the awards each year.

### **Demonstrate a measurable benefit.**

The questions on the form will help you demonstrate how you meet the criteria used by judges, which are set out in the information pack. In particular:-

It is vital to demonstrate a *measurable impact* by the time of the judging visits. We are very happy to help you with this, as we have experience over many years of seeing good nomination forms.

It is also vital to demonstrate an *integrated and strategic approach* to change – for example by describing the impact on employees, customers or other stakeholders as well as fixing performance problems or implementing new systems.

### **How can others learn from you?**

These Awards form part of our best practice programme and members really value this because of the way that they can learn and be stimulated to think afresh. For this reason we deliberately seek a wide range of entries – rather than limiting nominations to obviously 'planning' or 'technology' projects.

That said, it is our belief that successful change will usually demonstrate the use of planning and analysis skills – and often transform awareness of what these functions can contribute to the organisation. It is good, therefore, for you to tell us about this in your forms.

### **Let us help you put your case forward.**

We are more than happy to help you in completing your forms. We want to help you ensure that the right information is included so that judges fully understand what you have achieved. We can also make it as quick and simple for you as possible. Please ring or email me – or one of my colleagues if you are already in touch. We'd be delighted to help.

Best wishes



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# Customer Contact Innovation Awards 2015

## Nomination Form – Summary Page

Please tell your story *concisely* in answer to these questions. If you have more than one nomination, please submit each one separately – don't just cut and paste, unless it is a direct answer to the question.

### Example 1

This is a fictional example from a previous year, based on real-life nominations, with facts and figures removed or modified to protect commercial information. It is provided to save you time in completing the form effectively, but is not intended as the 'perfect' winning submission - for that please look at the criteria and previous award winners. Feel free to ring us if you have any questions.

### Name of Organisation and Department/Function

XYZ Company

### Title of project/innovation

Customer Experience Measures in the Call Centre

### Summary (max 150 words)

Tell your story, in your own words, so as to demonstrate what you have done and what has changed as a result.

- New MI infrastructure in 2014/2015 enabled performance data to be used at agent level for more consistent performance management
- Customer experience measures and First Contact Resolution are now embedded into the performance culture alongside adherence, productivity and sales.
- Analysis of the root cause of customer calls has enabled process improvement projects, targeted training and general buy-in and awareness of the importance of resolving the problem as the customer sees it.
- This brought departments together – creating cross-functional working and clarity around the problems that need fixing. Data has been invaluable in raising business cases and justifying investment/budgets.
- Fixing back office problems has reduced chaser calls and streamlining processes and responsibilities has enabled more calls to be handled at the first point of process.
- Detailed analysis provided evidence for re-calculating targets and re-engaging advisors

### Key results – what has improved? for which stakeholders? (max 120 words)

Bullet-point statistical evidence, wherever possible, to compare the situation (before vs after), for people, customer, business etc. Attach a few separate graphs (or qualitative evidence) if appropriate. If stats are hard to provide or results are still to come, it is essential to speak to us before submitting your form.

- Net Promoter scores are up 20% in the retentions area and there is a 60% rise in customer retention.
- In email/correspondence, first time fix is now 90% and productivity is up 40% as a result of introducing performance measures and customer focus.
- Employee satisfaction scores up 10% year-on-year, with biggest improvements in “feel our managers listen to us” and “Feel I make a difference”. Absence is down 15%.
- Cost per customer is down 20% and cross-sales of key products are up 25%.
- Root cause analysis has generated 24 project change initiatives – reducing calls in one department by 40% and transfers in another department by 55%.

### What makes this exceptional? (max 80 words)

How does your initiative stand out as innovative or special compared to other operations of your size/type/sector?

While many organisations are traditionally focussed on productivity, these measures have introduced a strong customer focus which differentiates us and allows us to do more with less by being effective rather than just efficient. The result are exceptional and we believe they are not met by our competitors.

### What could other operations learn from your innovation? (max 80 words)

In what ways might your innovation be a role model to our members?

- How to engender a new way of thinking and do more with less
- How MI can become part of the business, rather than simply a production team
- The value of an MI infrastructure that goes beyond EXCEL
- The value of information in helping put the customer first in reality
- How to drive project change by involving advisors in collecting and using root cause data

# Nomination Form – expanding the detail

Answer these questions to expand the evidence in the specified areas. Avoid page over-spill – adding any further information at the end of the form or as attachment if required.

## **What is the time-line for this innovation?**

What changes happened when? (to be eligible a key part of the change must have happened in 2014)

2014 - Corporate XXX strategy. Developed ne MI reporting infrastructure. First root-cause analysis work at the end of 2007 in the yyy dept. Training and development of the MI team.

2015 (Jan-Mar) – Took customer measures as part of the agent performance management targets. Introduced performance management to the email and correspondence areas.

2015 (Apr-Oct) – Training programme for all team leaders. Launch of the Customer First branding. Process changes in 3 departments resulting in call avoidance and fewer transfers

Changes to come –pqr initiative, zzz roll-out ....

## **What's the context for these changes?**

Give the bigger picture - eg what other internal or external changes have been happening that affect your operations(s) (even if unrelated to this specific project). Remember, judges may be from other industry sectors.

- XYZ is under fierce competitive pressure and is looking to differentiate on service as well as meeting stretching budget targets and managing the need for very fast change management
- The central information management team have developed the new infrastructure and worked with each of the departments in terms of developing new measures and driving change through performance management.
- This initiative is about using information to help get a focus on the needs of the customer and drive process and systems changes that make life easier for the customer.
- As well as changes within the centre, there have also been major changes in the product portfolio and extensive direct marketing/customer communication programmes.
- Employee satisfaction was lower than desired, with high attrition and sickness in many areas.

## **How are you now making better use of your resources in the organisation**

Give some further examples of measurable improvements – specifically in efficiency or effectiveness this last year.

- Cost per customer down 20% in pqr department due to call avoidance and fewer transfers.
- Cost per acquisition down 10% in the new sales area.
- Retentions up 60%

## **How is this an integrated approach to performance improvement?**

Show how you engaged colleagues and customers, taking account of their needs as well as business drivers in improving performance in a range of indicators, communicating change & creating understanding at all levels.

This project brought together the MI analysts with the operations teams and customer champions to create a real buzz around how to make a real impact on improving the customer experience. Working groups of advisors created ideas for improvements using the root-case data.

The Customer First branding gave a new lift to the performance management process. In several departments the introduction of the new system gave the catalyst for chancing targets or introducing more customer-oriented targets which helped introduce a new culture.

## Who has been most affected by these changes?

Please tick in the appropriate column (✓)	A lot	Significantly	A little	Not at all
Customers contacting your organisation	✓			
Front-line or back office agents	✓			
Team leaders and managers	✓			
Senior managers or directors	✓			
Planners/analysts etc	✓			
Other functions within the centre(s)	✓			
Other departments outside the centre	✓			
Third party organisations/ clients				✓
Wider community or neighbourhood	✓			
Other (specify)				

## About your customer contact operation

*What work to you undertake? What are your goals? How are you structured? What size is your customer contact operation? Where does your operation fit in organisationally and contribute to the overall organisation's key goals? Brief supporting documents may be attached. The purpose of this section is to provide background information to judges who may be from a different industry sector or type of operation.*

This is a customer service operation for a major operator in the XX sector. This is a virtual operation of 4 centres in the North East, Yorkshire, Wales and Bangalore (India) – handling x million calls pa with around x,000 FTE. The calls cover a wide range of sales, customer service and claims/fulfilment enquiries for the XXX business within the XYZ group. Advisors handle around 45 different major call types and there are also a number of small specialist units. The centres currently use a number of legacy systems and a wider systems integration programme is planned in the future.

The Customer Services director reports to the XXX CEO and the department includes Heads of Department for 5 business functions, as well as HODs for the support functions (including planning), finance and HR. We are accountable for cost and customer service targets as well as lead generation and sales. Our KPIs can be see in the attached graphs. The key challenges for the current business year have been to drive efficiencies and increase our customer satisfaction results. These support the corporate strategy of increasing customer retention, reducing the cost of both service and acquisition and establishing our new brand values.

## Who was involved in making this change happen?

This is the team to share the award if you are successful! Attach a document if further space required

Name	Job Title	Role in Project
	Customer Service Director	Project Sponsor
	Programme Manager	Project management and communications
	Champions co-ordinator	Co-ordinate employee champions
	MI Manager	Overall responsibility for measures/targets
	Head of Planning	Initiating process change projects
	Systems analysts	IT change projects
	Information analysts	Root cause data
	Production analysts	Creation of MI reporting infrastructure
	Contact centre managers	Implementation in centres
	Customer service managers	Performance management

**Where are your customer contact operation(s) located?**

North East, Yorkshire, Wales and Bangalore (India)

**Which centre would you suggest that the judges visit?**

*This question is only relevant if you have your operation in more than one location!*

Wales

**To which work streams or conference agenda areas might this relate?**

*Please tick as many as apply – to give judges an indication of where the focus is. See guidelines for more information about what the categories mean.*

Resource Planning		Back Office		Public Sector	
People/Lifestyle Planning		Outbound		Outsourcing	
MI and Analytics	√	Performance Management	√	Technology innovation	
Customer/process simplicity	√	Quality Management	√	People culture	√
Planning enterprise-wide		Strategy		End-to-end service	

**Please attach comparative graphs showing for the last 2 years**

- Evidence of the impact of your changes
- Performance against your KPIs, as a context for these changes

This information will be treated by judges as strictly confidential.

**Please list any attachments in the box below.**

1. Customer feedback data and quotes – these show what an impact this has made
2. Summary of the preliminary analysis from the employee satisfaction survey in September.
3. KPI Graphs (as requested above)
- 4.

**Any other information?**

Limit the amount you provide at this stage. The judges have only limited time during the short-listing process, but will read more detail at the finalist stage, during January, and at the visit in February.

# Customer Contact Innovation Awards 2015

## Nomination Form – Summary Page

Please tell your story *concisely* in answer to these questions. If you have more than one story, please tell them separately – don't just cut and paste, unless it is a direct answer to the question.

### Example 2

This is a fictional example from a previous year, based on real-life nominations, with facts and figures removed or modified to protect commercial information.

It is provided to save you time in completing the form effectively, but is not intended as the 'perfect' winning submission ... for that please look at the criteria and previous award winners.

Feel free to ring us if you have any questions.

### Name of Organisation and Department/Function

ABC Company

### Title of project/innovation

Lifestyle Choices

### Summary (max 180 words)

Tell your story, in your own words, so as to demonstrate what you have done and what has changed as a result.

- As a result of management changes in 2013, a cross-functional team was set up and this helped us make progress in areas where there had been much discussion but no movement.
- New working patterns replaced a complex 13 week rotation with new life-style options - some largely filled with new recruits. These give a much better match to the workload and allow more off-line time.
- New approach to recruitment targeted different groups in the community and filters on values and competence at an early stage – reducing drop-outs and making better use of interview time.
- This was the catalyst for parallel changes in the role of training - with new learning techniques and better support for inductees. This helped team leaders who no longer feel they have to mop up the problems.
- The increased diversity in working hours and background of recruits required many changes in operational management (eg hot-desking, breaks, time for briefing/training)
- A new 52-week planning process gives more accurate forecasts, supports cross-functional discussion and gives longer time horizons for recruitment, training etc

### Key results – what has improved? for which stakeholders? (max 120 words)

Bullet-point statistical evidence, wherever possible, to compare the situation (before vs after), for people, customer, business etc. Attach a few separate graphs (or qualitative evidence) if appropriate. If stats are hard to provide or results are still to come, it is essential to speak to us before submitting your form.

- Employee churn down from 55% to 25%, absence halved and part-time ratio up from 9% to 35%
- New starter attrition down 30% , 200% increase in applications, 100% uplift in successful recruits coming through the assessment centres and cost-to-recruit down 45%
- Catalyst for changes in training – with new starter quality up 50%.
- Schedule inflexibility down from 25% to 15% and adherence up from 80% to 95%.
- Planning, training, recruitment and operations are now part of cross-functional training teams and communication has hugely improved – with 24 improvement actions implemented in the last 6 months
- 75% of employees now feel able to balance home/work life. 85% feel listened to. (Employee survey)

### What makes this exceptional? (max 80 words)

How does your initiative stand out as innovative or special compared to other operations of your size/type/sector?

The results are exceptional and we believe they are not met by our competitors or other organisations in our recruitment markets. The people impact of these changes supports our brand and makes us a very different place to work and contact from others in our sector and type of operation.

### What could other operations learn from your innovation? (max 80 words)

In what ways might your innovation be a role model to our members?

- The benefits of integrating scheduling strategies as part of a wider review of people policies
- The branding and communications approach
- The new recruitment and induction approaches
- Targeting recruitment on new groups and offering lifestyle packages.



# Nomination Form – expanding the detail

Answer these questions to expand the evidence in the specified areas. Avoid page over-spill – adding any further information at the end of the form or as attachment if required.

## What is the time-line for this innovation?

What changes happened when? (to be eligible a key part of the change must have happened in 2015)

2014 - Corporate XXX strategy. Setup cross-functional team for Lifestyle Choices. Worked on changes to training and recruitment processes. Shift options consultation.

2015 (Jan-Mar) – Involvement of brands and communication to launch initiative.

2015 (Apr-Jun) – Internal teams re-organised. External recruitment launched. First new induction programme started.

2015 (July-Oct) – new recruitment took place, with new lifestyle options filled. Integration with Social responsibility programme.

Changes to come – superflex team, retentions initiative, homeworking initiative, zzz roll-out ....

## What's the context for these changes?

Give the bigger picture - eg what other internal or external changes have been happening that affect your operations(s) (even if unrelated to this specific project). Remember, judges may be from other industry sectors.

- ABC operate in a very competitive market, so there is intense pressure on cost efficiencies but we also need to differentiate on service. A corporate XXX strategy was launched in Oct 2014 by the new COO and this project has been cited as one of the early successes.
- Our centres are in popular call-centre cities – so recruiting and retaining the right people has always been a challenge – this initiative has linked with our social responsibility programme to create a much wider awareness in areas such as colleges, nurseries etc.
- The employee satisfaction survey in 2014 indicated unacceptable levels in some key areas – and this initiative has linked well with programmes driven by HR to work on these, as well as the new absence management programme and the Team Leader Academy.
- A new workforce management system in 2014 enabled us to identify the resourcing benefits of new types of shift (including part-time working) but it had not been possible to find practical ways of implementing this until this initiative brought together the different functions.

## How are you now making better use of your resources in the organisation

Give some further examples of measurable improvements – specifically in efficiency or effectiveness this last year.

- Reduction in schedule inflexibility from 25% to 15% means more consistent service and better chance for off-line activity – while reducing overall staffing costs by £X00,000
- New recruitment process means less time for team leaders away from their teams – and the induction process means that their new staff are much more ready. All this means they are more able to focus on coaching and development of their teams, which has helped improve customer satisfaction and first contact resolution. Conversion rate is up from x% to y% , reflecting better training and confidence – and the increased team leader focus.

## How is this an integrated approach to performance improvement?

Show how you engaged colleagues and customers, taking account of their needs as well as business drivers in improving performance in a range of indicators, communicating change & creating understanding at all levels.

- The new rostering approach has dramatically reduced attrition and improved morale – because it offers choice and provides a life-style package that not only meets the needs of people who would previously not have thought of joining us, but also enabled existing employees to make choices and feel in control. The use of focus groups and a high-profile launch, plus the branding were key to buy-in, but perhaps the most important part was the involvement of team leaders, so that they could communicate directly with their people
- The training and induction process not only supported the life-style choices initiative, but was also strongly linked to the customer experience programme – but focussing training and coaching on end-to-end service and the new performance measures such as First Contact Resolution and Net Promoter

## Who has been most affected by these changes?

Please tick in the appropriate column (✓)	A lot	Significantly	A little	Not at all
Customers contacting your organisation		✓		
Front-line or back office agents	✓			
Team leaders and managers	✓			
Senior managers or directors		✓		
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Other functions within the centre(s)	✓			
Other departments outside the centre			✓	
Third party organisations/ clients				✓
Wider community or neighbourhood		✓		
Other (specify)				

## About your customer contact operation

What work to you undertake? What are your goals? How are you structured? What size is your customer contact operation? Where does your operation fit in organisationally and contribute to the overall organisation's key goals? Brief supporting documents may be attached. The purpose of this section is to provide background information to judges who may be from a different industry sector or type of operation.

This is a customer service operation for a major brand in the YYY sector. We run a virtual operation of 3 centres in Manchester, Glasgow and Bristol – handling x million calls pa with around x,000 FTE. The calls cover a wide range of customer services enquiries – with around 20 primary skills – and involve some cross-selling. This operation includes a number of smaller specialist teams, but the innovation described here has applied primarily to the high-volume main areas.

The Customer Services department reports at Director level to the Chief Operating Officer, who reports to the group CEO. We are accountable for cost and customer service targets as well as lead generation and sales. Our KIPs can be see in the attached graphs. The key challenges for the current year have been to drive efficiencies and increase our customer satisfaction results. These support the corporate strategy of increasing customer retention, reducing the cost of both service and acquisition and establishing our new brand values.

## Who was involved in making this change happen?

This is the team to share the award if you are successful! Attach a document if further space required

Name	Job Title	Role in Project
	Centre Manager, Bristol	Project Champion
	CSM, Manchester	Pilot team roll-out & ops communication
	Training Manager	Training transformations
	Recruitment Manager	Recruitment transformations
	Resource Planning Manager	52 week planning process
	Scheduling Manager	Schedule proposals and implementation
	Scheduling Analyst	Schedule proposals and implementation
	Programme Manager	Project management and communications
	Champions co-ordinator	Co-ordinate employee champions



**Where are your customer contact operation(s) located?**

Manchester, Glasgow and Bristol

**Which centre would you suggest that the judges visit?**

*This question is only relevant if you have your operation in more than one location!*

Manchester

**To which work streams or conference agenda areas might this relate?**

*Please tick as many as apply – to give judges an indication of where the focus is. See guidelines for more information about what the categories mean.*

Resource Planning	√	Back Office		Public Sector	
People/Lifestyle Planning	√	Outbound		Outsourcing	
MI and Analytics		Performance Management		Technology innovation	
Customer/process simplicity		Quality Management		People culture	
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This information will be treated by judges as strictly confidential.

**Please list any attachments in the box below.**

1. Verbatims from customers as part of the customer satisfaction research – showing evidence of the improvement stemming from the increased skills and confidence of new starts in particular.
2. verbatim comments from employees from the latest employee satisfaction survey
3. one-page article from the Manchester Evening News about our community programme.
4. KPI Graphs (as requested above)
- 5.

**Any other information?**

Limit the amount you provide at this stage. The judges have only limited time during the short-listing process, but will read more detail at the finalist stage, during January, and at the visit in February.