

**Changing Gear**  
Rise to the Customer Challenge

The **Forum**  
Raising Standards in  
Customer Operations

# Customer Strategy & Planning 2015

27<sup>th</sup> – 28<sup>th</sup> April, Newcastle



# Delivering Engagement through Innovation



**RESPONSE**  
Building Rewarding Relationships

# The Brief



As a people organisation we wanted to provide the right tools to our people to effectively engage with our people both in and out of work.

We wanted to bring disparate systems together and provide a single interface that all employees could use on the device of their choosing

We wanted something totally unique and innovative that would provide the 'Wow' factor whilst also addressing a real business need

**RESPONSE**

Username

Password

Login

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***Businesses are creating the connected customer.  
We are creating the connected employee.  
We created Engage.***

# The Strategy

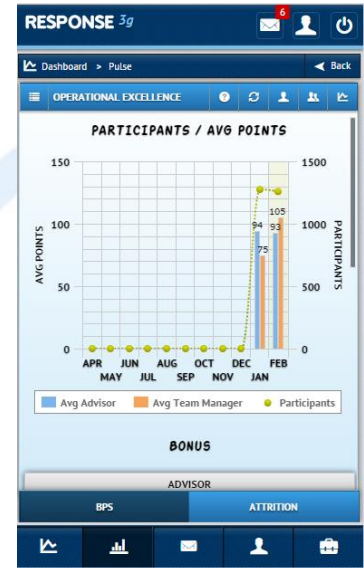


We embarked on an overall strategy to deliver to our people a device agnostic application built using the very latest technologies. The core strategy was: -

- It needed to be highly user friendly and intuitive
- It needed to be engaging and informative
- It needed to provide real time information
- It needed to be personal
- It needed to drive business initiatives
- It needed to be easily accessible

The core elements it needed to deliver were:-

- Allow our employees to see their schedules
- Allow our employees to see their availability
- Allow all our employees to see their personal performance
- Allow all our employees to feel connected to the business



# The Approach



We commenced the project in late 2013 and immediately established a project group focused on:-

- Design and Technical Architecture
- User Experience
- Information mapping & Requirements
- Security and Compliance
- Internal Communications
- Master system access.



The project team consisted of representatives from throughout the business from Advisor to Director and operated on a 'no limits' basis.

# The Results



Since going live in January 2014, the statistics speak for themselves. From creating the solution from nothing we now have a unique solution that fully engages our people from the moment they join the organisation.

- The solution has been logged in 116,589 times
- The solution has been logged in 43,743 times out of hours.
- It has been downloaded onto 1,965 Apple Devices
- It has been downloaded onto 1,117 Android Devices
- Our employees have accessed their schedules 199,459 times
- Our employees have viewed their availability 35,703 times
- Our employees have viewed their performance 35,564 times
- Our employees have sent 8,147 messages to their teams.

STATISTICS	
LOGGED ON BY DEVICE TYPE	
Browser	54149
Mobile / Tablet	62956
Total	117105
APP DOWNLOADS BY PLATFORM	
Apple	1965
Android	1117
Windows	129
LOGINS BY TIME / DAY	
All	177249
Before 8	16834
After 8	17852
Saturday	10671
Sunday	15220



# DEMO

# The Roadmap



A solid roadmap for the Engage App is now in place, with focus this year on: -

- Graphical Real Time Interface for Real Time Monitoring
- Continued migration of the legacy MI stack to the presentation layer
- Client Dashboard Access
- Training & Graduation Performance
- Trend Analysis and Proactive intervention queues
- Extended Support Team visibility
- Financial Control Management



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