



*“Never be satisfied with the status quo. We don’t say ‘can we do this?’, we say ‘how do we do this?’ We’re having a different kind of conversation.”*

***“We’re bringing everyone along on this journey, saying to a team: this is your system to use. Don’t impose, engage.”***

*"We can now turn around inputs so rapidly ... to agree the plan quicker and with far more confidence."*

*"It's been an evolution, we've always worked closely with the planning team but now we have greater connectivity between budget and planning teams."*



**The Forum**  
Raising Standards in  
Customer Operations

## Confident: driving improvements in the operating model

Connected planning at RSA gives visibility to the impacts of different decisions, at a remarkably detailed level. Home Claims is a great example, needing huge resilience given the volatility resulting from climate changes. Previously, there was lots of multi-skilling, always difficult from a people and leakage perspective. Now the operating model has evolved, shaped by the way strategic resource plans have developed. People are more confident of the numbers and can better determine what's needed across the planning cycle. This has freed up time to invest in other systems (like IEX) and review other areas. For instance, shift patterns have improved from an agent perspective and parameters can be set to stagger breaks. And more flexible working requests are being accommodated. "We have just had the worst storms in seven years and our team are all engaged and happily working extra hours" "Attrition is much lower" "I'm so proud of what the planning team have done" "It's reshaped how we work".

## Agile: evolving budget plans and continuous improvement

- The team's model is now a key tool in the company-wide planning process, with frequent budget reviews in place: weekly, monthly and quarterly. Furthermore, the team is adept at turning around multiple budget scenarios at an astonishing speed.
- Leaders focus on variance from budget and actions that mitigate this. Planning create understanding of potential impacts, risks, opportunities and financial performance. Part of many change projects, their analysis is built into the wider business plan in a measured way.
- Agile principles drive a continuing development of planning models. A 'minimum viable product' was delivered initially and now a continuous improvement ethos drives development of the strategic plan. 'User stories' show how the model should work and these are developed in Anaplan by 'scrum' teams with SMEs within the planning team.
- Crucially, new lessons were captured and learned every day, a lot of learning for a budget plan. Now the team's remit has expanded beyond traditional planning, with a key role in driving continuous improvement across the business in a data-led manner.

"So much quicker" "Go-to point for key KPIs" "Transforms recruitment speed" "We trust the data" "Really stress tested" "Sometimes, simple is the hardest thing to do"

***"Combining effort and methodology enables a fluid and dynamic conversation with stakeholders."***

**Andrew McIntyre,**  
Forecast & Capacity Consultant

***"The intuitive nature of the model was what came out as key in the user feedback."***

**Ben Clark,**  
Forecast & Capacity Consultant

***"We have to balance various areas. Good planning helps navigate those nuances. Plans are accurate, with a more granular approach."***

**Fiona Green,**  
Home Claims Functional Leader

***"We gathered hundreds of user cases. We could refer to each user story and demonstrate how it does what each user had asked for."***

**Gareth Willott,**  
Technical Best Practice Manager

***"We can automatically demonstrate what would happen to staffing in a given scenario with a high accuracy. It can be a decision-making tool."***

**Helen Goddard,**  
Forecast & Capacity Leader

***"We were making sure the wider team understood, linking back so they were engaged, knowing it was going to be what they'd asked for."***

**Hilary Williams,**  
Service Level Planner

## Results

- Colleague engagement up 10% year on year, now 71%
- 100s of hours saved for every quarterly budget forecast
- Effort halved for the Monthly Business Planning Review
- Bridged a 5FTE resource gap in the team



***"Three years ago we weren't used to agile. We hadn't anticipated the huge cultural change required. This has been a cultural journey."***

**Jenny Hayes,**  
Head of Planning

***"We find people are often cautious to try new things. This team jumped in with both feet. They have a 'can do' attitude. The culture of continuous improvement has been key to success."***

**Heidi King,** Customer Success  
Business Partner at Anaplan

***"There's much clearer visibility on where time is spent, we can see the impacts quicker and get signoff quicker. We are far more granular at this strategic plan stage."***

**Rhydian Llewelyn,**  
Finance Director, Claims