



Insight and Questions For Benchmarking Operational Performance

By David Scott, Founder dhp



dhp is an agile digital partner for back-office workflow optimisation
Nexus omni-channel workforce optimisation by dhp enables efficient
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Section 1: Organisational design and Business Process Management

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1a. Focus on ensuring that your organisation is structured effectively to deliver for the customer

Look at your business from a customer's perspective, to understand what is important to them and how they want to interact with you.

Questions:

- How easy is it for your customers to do business with you?
- Have you been a customer and experienced your own processes?
- Have you experienced calling in, picking a policy ref and tracking it through the customer journey
- When did you last follow a letter or call right through your operation and experience what your customer feels?
- Do you have an End to End tracking measure over key processes – how long does it take to move through the process and where are the bottleneck repeat contacts

1b. Be able to forecast work expected and plan for it

Balancing consistent high service delivery with cost efficiency is a key requirement. By carrying out long term and short term forecasting and scheduling, customer demand can be matched with the correct skills required to enable a consistent service to be delivered.

Questions:

- How accurate is your current forecasting and who is determining this ? in either BO or CC
- Are you aligned to Industry Best Practice metrics to determine whether scheduling is good enough to deliver consistent service throughout the day?
- Are skills shortages impacting on your ability to deliver service?

1c. Create an environment that encourages and rewards ideas for continuous improvement

All business markets change and evolve; customers inevitably compare your delivery against their experience elsewhere, which may have been better. Nothing stands still and you need to be continuously improving, otherwise you will actually be going backwards.

Questions:

- Are you the driver of ideas or are your teams delivering innovation?
- Can you measure delivery and is it rewarded?
- Is there a focus within your teams of making the operation faster, better and more efficient ?
- How do you know that what you are delivering is good enough?

Section 2: Transparency, Measurement, and Performance management

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2a. Be able to accurately measure the workload in your operation

Effective measurement of the workload is achieved in a two stage process:

- Setting up defined and controlled systems to understand the received and outstanding workload in your operation. This includes all activities such as the number of calls, pieces of post, e-mails, web chats, quality checking, sms, live chat, bots etc.
- Converting this workload into the effort (normally hours) required to complete the work.

Questions:

- Do you know how much work was received, completed and outstanding in hours yesterday and how many hours were paid for in terms of resources?
- Do you have enough people available to deliver what is required in the time available and do they have the correct skills and autonomy levels ?
- Do you know how much work by key process is recorded, completed and outstanding
- Understand the trends and what is causing them?

2b. Have a clear understanding of how work is controlled in your operation

Controlling the received, completed and outstanding work enables managers to allocate work to correctly skilled resources. Allocation of work can take many forms and there are advantages and disadvantages of each - the method chosen depends on the work, skills and maturity of the teams and their leaders.

The important underlying requirement is to be clear about what advantages your method is delivering and why it's set up in the way that it is.

Questions:

- Do your Front line Managers know how work is received by your front line staff and the ways it can be manipulated?
- Are your systems and managers using the best in class methods of distributing and controlling the work? Includes: Self analysis Spreadsheets and push workflow through to Work Management tools designed by Operations to deliver
- Are you measuring all staff consistently, irrespective of skills and work types - are you sure you have enough of the right skilled people to deal with the work you are getting?
- Is all your MI on spreadsheets and manually configured / sourced

2c. Understand what is driving activity – why are customers calling or writing

The ability to understand why customers are calling enables you to take action on the right things. Principal objectives should be to deliver added value aligned to service proposition, including reducing errors, rework and waste through demand failure.

Questions:

- Can you measure whether the letters you are sending to customers cause work?
- Has something changed that is prompting your customers to call (handoff from CC) or write?
- How many of your calls or letters are complaints from your customers? Do you have root cause indicators that consolidate with E2E data, Quality MI, Rework and losses data
- How much of your work is rework from upstream processes?

2d. Make sure your staff know what is expected and that they have clear performance indicators

Involves an understanding of outcome measures aligned to customer satisfaction, business rules, people satisfaction and costs, then assessing how the activities of staff impact on these outcomes. By subsequently measuring the inputs that deliver these outcomes, a balanced set of Key Performance Indicators can be introduced for leaders to performance manage against.

Questions:

- Do you have a comprehensive set of metrics aligned to best in class ?
- Are these metrics clearly defined, measured and understood at all levels?
- Are the performance measures consistent across your operation?
- Are the management and frontline staff metrics complementary to each other?

Section 3: Leadership

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3a. Are you managers monitoring staff performance throughout the day, rewarding success and coaching where required

Managers who practice active engagement and connection with staff, who support, reward and who coach and challenge delivery throughout the day will increase performance.

Questions:

- Are your managers sat behind computers, or in meeting rooms all day, rather than with their teams?
- Are your managers inline with IBP in where they spend their time to deliver BIC
- What are the main responsibilities in your management role descriptions? Do their diaries show the same activity?
- How often do your managers check progress with their staff during the day?

3b. Ensure that all staff know what is important to the business and they receive regular updates on progress

Performance management is not just the process for quarterly and annual appraisals. It includes the day to day interaction of leaders and staff about how and what they are doing to deliver the objectives set.

Questions:

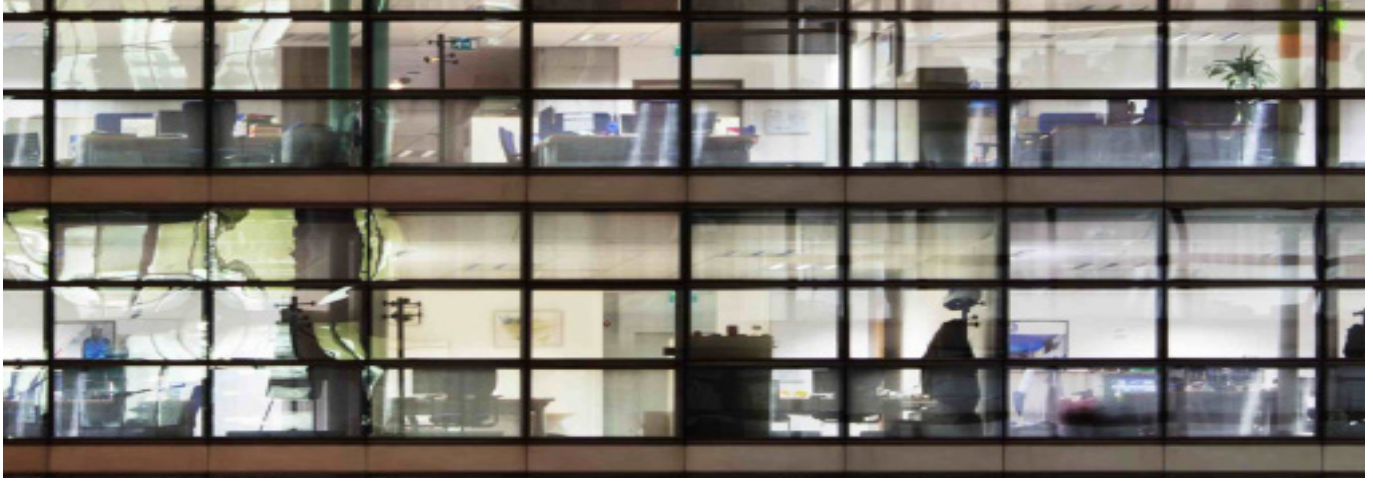
- How often do your teams have a huddle and what do they discuss?
- Does everyone have a common understanding of what is important, have you asked?
- Do your staff receive regular updates on how they and their team have performed - not just at 121s or when things are not right ?

3c. Develop your managers to lead their staff

Many team Leaders and middle managers have risen through the ranks with little training in how to manage and lead their people.

Questions:

- Why are managers successful with some staff and not others
- Are your managers equipped to deal with situational leadership and getting the best out of an empowered team?
- Can they inspire staff to deliver more? Are they managing correctly and do they lead



About the Author

David Scott

We founded dhp after seeing a need to focus on operational transactional activity and show the value it brings to companies like yours.

Delivering best in class solutions

Our objective is simple: we help to create high-performance organisations. We transfer new skills and abilities, providing strategies and techniques to develop Operations Managers to become more effective and adopt a process of continuous improvement. For each of our clients, we have achieved a more competitive operation and delivered significant cost savings.

There is a depth and breadth of operational experience within our team. We are likely to have addressed the issues that test you daily and will guide you in the challenges ahead, using a truly collaborative, transparent and supportive approach.



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