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Case Study (January 2007)

Client Relations Role Project

Background

Our client company is a large (5000 employees) provider of outsourcing services to the financial sector and other industries in North America. The senior executive responsible for both Sales and Client Satisfaction was our sponsor. The client had recently integrated the Sales and Delivery Management functions into Customer-centric teams. In doing so, many changes were made to the Client Relations role. These changes included reduction of staff and significant changes of authority and responsibility. For many good reasons the changes had been implemented very quickly. Our client realized there were “speed cracks” in process/job design, inconsistency of execution, lack of employee buy-in, and morale issues. Our client asked ProFitness to investigate and recommend solutions to these issues.

The Solution

We took various lists of issues, which were aligned by product and location and integrated them to find the common threads. We then led a series of one-day workshops across Canada with the Client Relations staff and senior delivery management to understand, rank and address each issue. We also solicited input from the location teams about how this change had been introduced. We then compiled the location-level recommendations into a national package and highlighted disparities to our sponsors for their arbitration. All issues were resolved within the four-week project window and implementation responsibility was subsequently assigned to a senior line manager. Our recommendations will lead to improved Customer-visible quality and consistency across locations and product units; greater internal efficiencies will also be realized as a result of process changes and role clarity. As added value, we provided a change management guide to the client to help ensure future changes are managed effectively. Both the location teams and our client were very pleased with our approach, speed, and thoroughness.

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