



**RXP**erience

The big picture for Call Centres



# Business Link Mystery Shopping Phase 2

12<sup>th</sup> May 2010



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# Objectives

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## Brief

- Undertake a Mystery Shopping exercise of Business Link North East so that the Customer Experience can be evaluated against last years findings
- Engage the main contact point of business – telephone plus a small sample of emails and face to face - with relevant scenarios that can be documented and assessed



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# Methodology



# Primary diagnostic

- Contacts evenly distributed across sub-regions
- Enquiry types distributed approximately
  - Pre/Pre start
  - Start Up
  - Plus Ex offender, Durham Training, Service Knowledge Tool



# Primary diagnostic

- Final Target Sample 100
  - 94 Telephone: 6 Email
- Approximately 140 contacts made
- 90 recorded calls
- 6 emails
- 30 calls not recorded (approximately)



# Primary diagnostic

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- Where possible, real businesses used for contact scenarios
- Scenarios based on probable business issues
- Aim for every telephone contact to be recorded
- Calls recorded from point of entry i.e. greeting, music, hold, transfer etc
- Email contact: [enquiries@businesslinknortheast.co.uk](mailto:enquiries@businesslinknortheast.co.uk)



# Recap 2009

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## Recommendations





# Phase 1 Strategic recommendations

- Process must support customer focus
- Motivation to be to assist, to develop and maintain relationship
  - Against identified criteria
  - Mindset = develop customer relationship, not government agency
- Target key sectors
  - Improve sector knowledge: focus not just on geography
- Consider balance of value-add vs. impartiality



# Phase 1 Process recommendations

- **Priority: initial contact**
  - Clarify role
    - Customer service NOT administration
  - Consistent behaviour and routing driven by business rules
- **Review roles and performance standards against existing good practice within the service**
  - Identify opportunities to add value at each step in the process: moments of truth
- **Must ensure activities are compliant with relevant legislation e.g. Data Protection**



# Phase 1 People recommendations

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- Review overall resource levels
  - Campaigns
  - Holiday cover
- If strategy drives towards lean customer management
  - First point of human contact must have higher skill level/ability to engage: *“I could have gone to the website myself”*



# Phase 1 Technology recommendations

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- Review current access configuration
  - 0845 mobile/out-of-area-access
  - Queuing and messaging
- Facilitate warm transfer between CSO and RM



# Findings 2010

## Primary diagnostic caveat:

- Slightly different structure since 2009




# 2009 v 2010

## 2009


## 2010

Access

 Call 19

 Call wav 8


Call structure

 Call 35 part 1

 Call 100 part 1

Knowledge

 Call 23 part 1

 Call 23 part 1



# Primary diagnostic

- **Pre Start**

- Initial Contact CSA

- Easy access quick, conversational, did not feel “form filling” 

Call wav 60 part 1

- Initial Contact BSA 

Call wav 60 part 2

- Very professional, keen to help, appropriate level for pre/pre start
    - Good email follow up

- Follow Up

- Approximately 6 weeks later.....

Call Olympus 000084





# Primary diagnostic

- **Start Up**

- Initial Contact



Call 43 part 1

- Easy access, very conversational, did not feel “form filling”, advised what would happen with the call, who BL are, how they could help

- Follow Up



Call 9 part 1

- Very professional, constant contact, keen to help – beyond expectations!

- Business Support Advisor



Call 47

- Good advice, sent information, set up meeting, proactive throughout, Relationship Manager very informative over telephone





# Primary diagnostic

- **Enquiry – General**

- Initial Contact



Call 50

- Easy access, very conversational – no form filling or unnecessary details taken when not necessary

- **Enquiry – Apprentice**



Call 40 part 1

- Very professional, constant contact, other resource explored instantly

- Skills Broker

- Good advice, sent information, keen to help, offered meeting, willing to give advise over the phone



Call 39 part 1



# Primary diagnostic

- **Event**

- Initial Contact



Call 23

- Easy access, very conversational, did not take lengthy details

- Follow Up

- Very professional, constant contact, keen to help

- Event Organiser

- Helpful, may send information



Call 16



# Primary diagnostic

- Durham Training

**(NOTE not to be shown on 12<sup>th</sup> for Helen H and John only)**

- Initial Contact CSA



Call 58

- Easy access, very conversational

- Follow Up BSA



Part of call 58

- Very professional, keen to help, set up meeting with RM

- Follow Up BSA/ RM




Call 77

- Not so helpful – would not help over the phone
- Insisted on meeting
- No follow up



# Primary diagnostic

- **Other**
  - Not all good
    - Out of area
    - Ex Offender?  Call 78
  - Consistency
    - Redundancy ACAS or BSA?
  - Business Support Tool
    - Newspapers in North East
    - Boiler Scrap Scheme



# Primary diagnostic

- **Issues.....**
  - Transfer to Business Support Advisor
  - Getting hold of Business Support Advisor
  - Voice mail of Business Support Advisor
  - Are Business Support Advisors challenging enough?



# Primary diagnostic

- **Email Contact**
  - Only to enquiries@businesslinknortheast.co.uk
- **Email**
  - Fast turn around – within a working day
  - Appropriate links for easy questions
  - No “form filling”
  - Good use of email by BSAs



# Primary diagnostic

- Email - 2009
  - Recap 2009

**From:** Jessica Plummer [mailto:jessypl@hotmail.co.uk]  
**Sent:** 08 April 2009 11:49  
**To:** Customer Service Enquiries  
**Subject:** Premises

Dear Business Link,  
I have been running a successful cleaning business for nearly a year and was thinking about employing a friend to work with me. Before I commit to this I would like some advice about being an employer - is this something that you could help me with (or could you point me in the direction of someone who can help me).

Thanks very much  
  
Jessica Plummer  
Domestic Goddesses



# Primary diagnostic

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## • Email - 2009

Subject: RE: Premises  
Date: Wed, 8 Apr 2009 11:53:46 +0100  
From: CustomerService@businesslinknortheast.co.uk  
To: jessypl@hotmail.co.uk

Dear Jessica,

Thank you for your recent enquiry. I understand you wish to discuss becoming an employer.

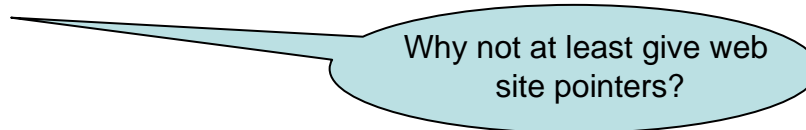
In order for us to proceed with your enquiry I would be grateful if you would kindly provide us with the following information:

Name of the Company  
Full Address of the Company (including Post Code)  
Telephone Number  
Nature of the Business  
Established Date for the Business  
Are you VAT registered? If so please supply VAT number  
Have you notified Her Majesty's Revenue and Customs that you are now liable for Class 2 National Insurance?

We look forward to hearing from you soon.

Yours sincerely,

XXXXX







# Primary diagnostic

## Email Contact 2010

To: [enquiries@businesslinknortheast.co.uk](mailto:enquiries@businesslinknortheast.co.uk)

We are looking for office premises in central Newcastle. Who would be the best person in your organisation to discuss our options of relocation?

Kind regards

Fiona Smith



# Primary diagnostic

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## Email Reply 2010

- **To:** Fiona Smith
- **Subject:** Business Link
- Dear Fiona
- 
- Thank you for your recent enquiry. I understand you wish to discuss office premises in Newcastle.
- 
- To enable me to deal efficiently and assist you with your enquiry, I may require further information, could you please provide a day time contact number or an alternative communication method. Alternatively, you can contact our Customer Service Team at your convenience on telephone number 0845 600 9006 Monday to Thursday 8:30 to 17:00 and Friday 8:30 to 16:30.
- 
- I trust this meets with your approval and look forward to assisting you with your request.
- 
- Kind Regards
- 
- Sherri
- 
- Customer Service Adviser
- Business Link



# Primary diagnostic

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## Email Contact 2010

We have used your web site extensively over the last few months in preparation for our new business venture. We would now like to speak with someone who could advise on financial assistance in setting up a photography business. It will be based in Middlesbrough and there will be 4 of us setting up the business together.

Best regards,  
Louise

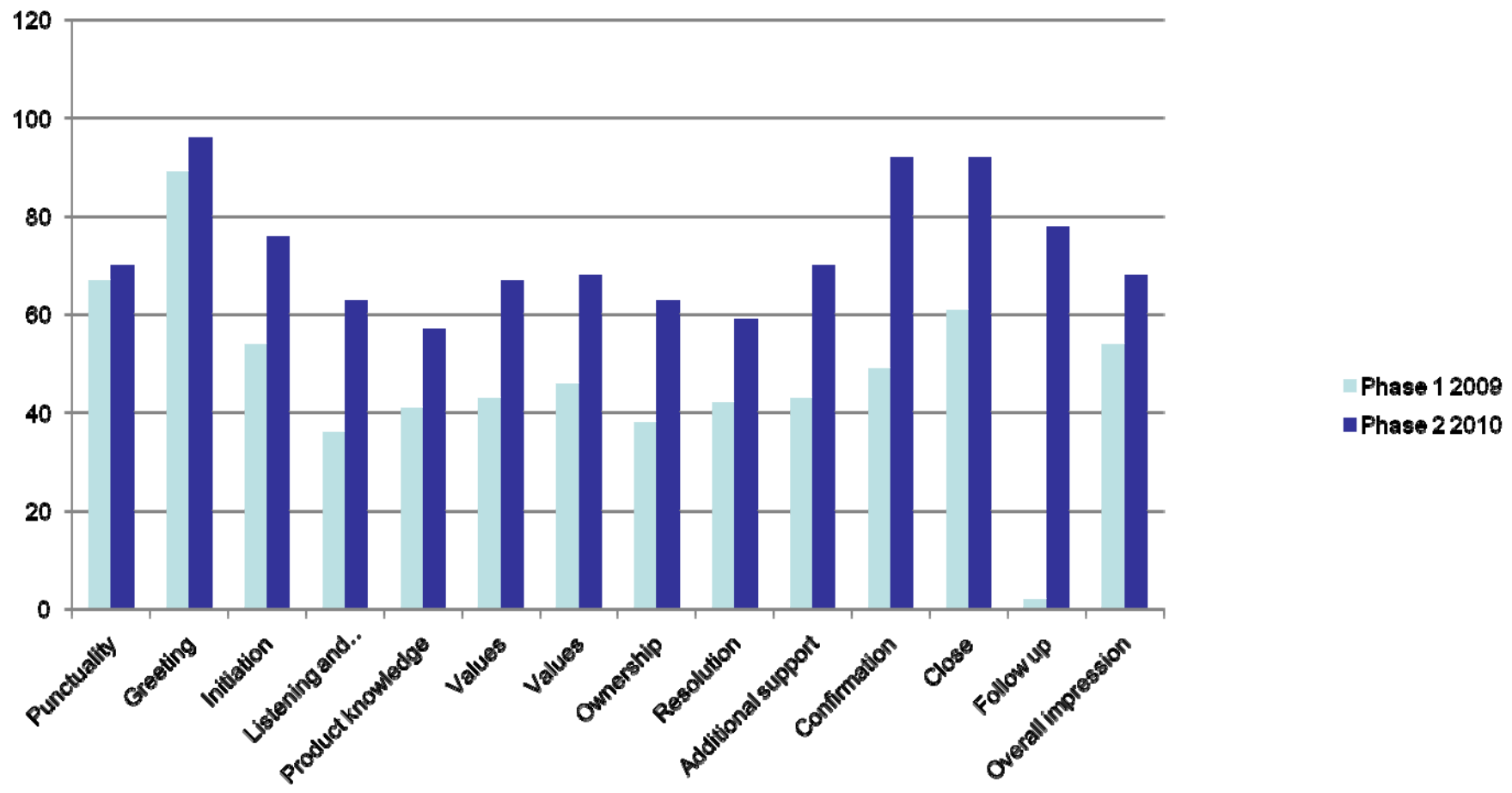
Louise Forgan  
Office: 01753 710421

***Same day phone call asking how Business Link can help!***



# Primary diagnostic

## Analysis of the criteria





# Primary diagnostic

- Phase 2 – What is different....
  - Better “technically”
  - Prompt answer
  - Good greeting
  - Friendly staff
  - Good questioning
  - No form filling!
  - More interest
  - More knowledge



# Primary diagnostic

- **As a result**
  - More flowing
  - More proactive
  - The post code has virtually gone!
  - Knowledge of Business Support Advisor
  - Persistence of Business Support Advisor
- **It is a completely different journey!**



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# Business Link Mystery Shopping Wave 2 Findings – In Depth Diagnostic



# In-depth diagnostic

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- **Aim**
  - To provide review of the in depth diagnosis and brokerage element of the BENE offer
- **Methodology**
  - Recruit real businesses with real needs
  - Experience assessed against agreed 'mystery shop' criteria
- **Sample**
  - 10 – 12 'experiences'





# In-depth diagnostic

## Sample



# In-depth diagnostic

- **Sample 2010**
  - 18 ‘shoppers’
    - From 48 recruited and fully briefed
  - 14 completed
    - 11 in-depth interviews (4 retained customers from 2009)
    - 4 funding (1 from in-depth, 3 recruited)



# In-depth diagnostic

- Sample 2009 versus 2010

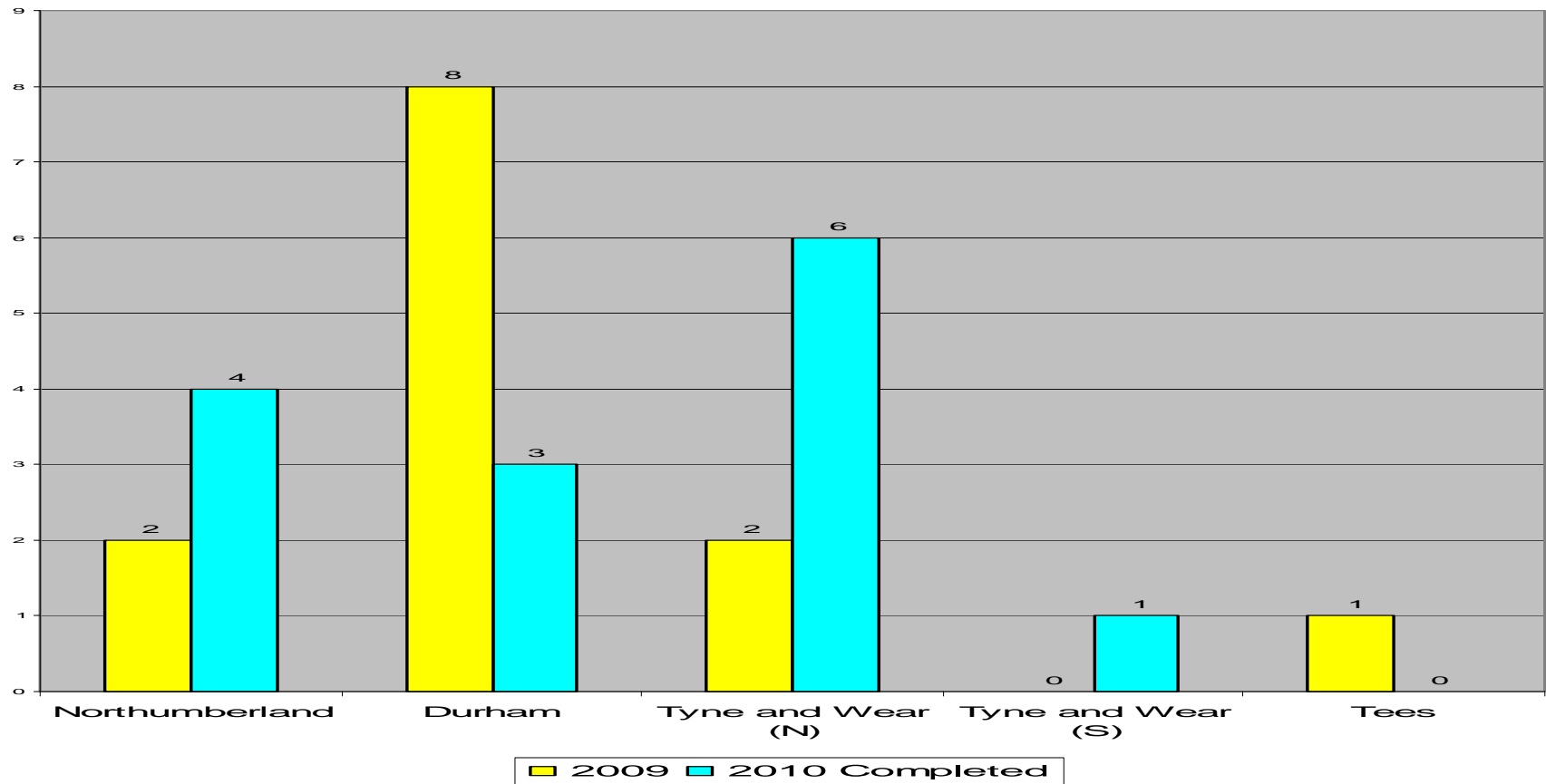
	2009	2010	Notes
Recruited and Briefed	33	48	
Dropped Out	0	30	Too busy/business priorities
Routed Out	20	4	
Depth Achieved	13	11	Plus 2 in progression
Funding Achieved	0	4	3 additional 'shops' 1 from initial enquiry (NB 3 potentially progressing)



# In-depth diagnostic

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- Geographical Spread





# In-depth diagnostic

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- Achieved sample: Northumberland

Ref	Sector	Rural	Ownership	Enquiry	Repeat/New
1	Food and Drink	Yes	M	Export	R
4	Creative	Yes	F	Start Up	N
10	Horticulture	Yes	M	Capex	R
15	Food and Drink	Yes	M	R&D (funding only)	N



# In-depth diagnostic

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- Achieved sample: Durham

Ref	Sector	Rural	Ownership	Enquiry	Repeat/New
3	KIBS	Semi	F	Marketing and Training	Y
7	HR	No	M	Innovation Voucher	N
9	KIBS	Yes	F	Training	Y



# In-depth diagnostic

- Achieved sample: Tyne and Wear - North

Ref	Sector	Rural	Ownership	Enquiry	Repeat/ New
2	Creative	No	M	Website	N
5	HR	No	M	Innovation Voucher	N
6	Distribution	No	M	Website	N
11	Creative	No	F	Start Up	N
12	Software (KIBS)	No	M	Employment/ Apprentice	N
13	Creative	No	M	Marketing	N



# In-depth diagnostic

- Achieved sample: Tyne and Wear – South

Ref	Sector	Rural	Ownership	Enquiry	Repeat/ New	Area
14	Distribution	No	M	Training	N	South

– 1 routed out

- Achieved sample: Tees

– 3 routed out





# Findings

## In-depth diagnostic



# In depth diagnostic

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## CONTEXT

- The methodology used in this research was qualitative
- This allows for a more in depth analysis of respondents' views
- Due to the nature of this research small sample sizes are used and the findings cannot be expressed in terms of statistical significance
- **However, all findings relate to real customer experiences**
  - Scoring base (identified on chart) two main formats:
    - Yes = 1, No = 0
    - 0 = not at all, 0.25 = minimal, 0.5 = acceptable, 0.75 = fully, 1.0 = exceeds expectations
  - *Quotations in italics*



# In depth diagnostic

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## CAVEAT

- The methodology is not directly comparable to the 2009 survey
  - Some respondents were retained to provide a longer term perspective
  - New 'shoppers' included those with prior, as well as current, experience of Business Link
  - NEEIC was not evaluated in 2009
  - Greater/longer experience of the Business Link service gives more in-depth views of the offer.



# In-depth diagnostic

- **The journey**

	2009	2010	Notes
Average Wait (days)	10.3	7.7	
Shortest Wait (days)	6	5	Northumberland
Longest Wait	11 weeks	17	T&W N (prompted by 'shopper')

- Funding from initial enquiry to funding meeting:
  - 34 elapsed working days (1 example)
- Some funding applications experienced 1 to 3 months delay due to lost paperwork



# In-depth diagnostic

- **Punctuality (1 = yes)**

	Customer Service Advisors	Business Support Advisors	Business Advisors	Funding (application)
2009	0.8	0.7	0.9	n/a
2010	1	0.4	1	1

- 2009 issues:

- Cut offs (0845 number) /lack of availability of RM (now BSA) due to holidays etc., evidence of stress, routing out, promised call backs not happening

- 2010 issues:

- Marked down due to transfer time to BSA, but not considered an issue. Key problems = delays in paperwork after application



# In-depth diagnostic

- Greeting and initiation (1 = yes)

		CSA	BSA	BA	Funding
Greeting	2009	1	0.9	0.9	n/a
	2010	1	1	1	n/a
Initiation	2009	0.8	0.9	0.8	n/a
	2010	1	1	0.9	0.8

- 2009 issues:

- Some unwelcoming responses/routing outs/awkward handovers/incorrect briefings

- 2010:

- Cheerful greetings, smooth handovers, accurate briefings in the main
- Some duplication in NEEIC requirements but most BAs worked hard to minimise this



# In-depth diagnostic

- Compliance (1 = yes)

	CSA	BSA	BA	Funding
2009 - Sought information	0.4	0.3	0.4	n/a
2009 - Stated purposes for which held	0.3	0.3	0.6	n/a
2010 – Compliance (sought and stated)	0.7	0.7	0.8	1

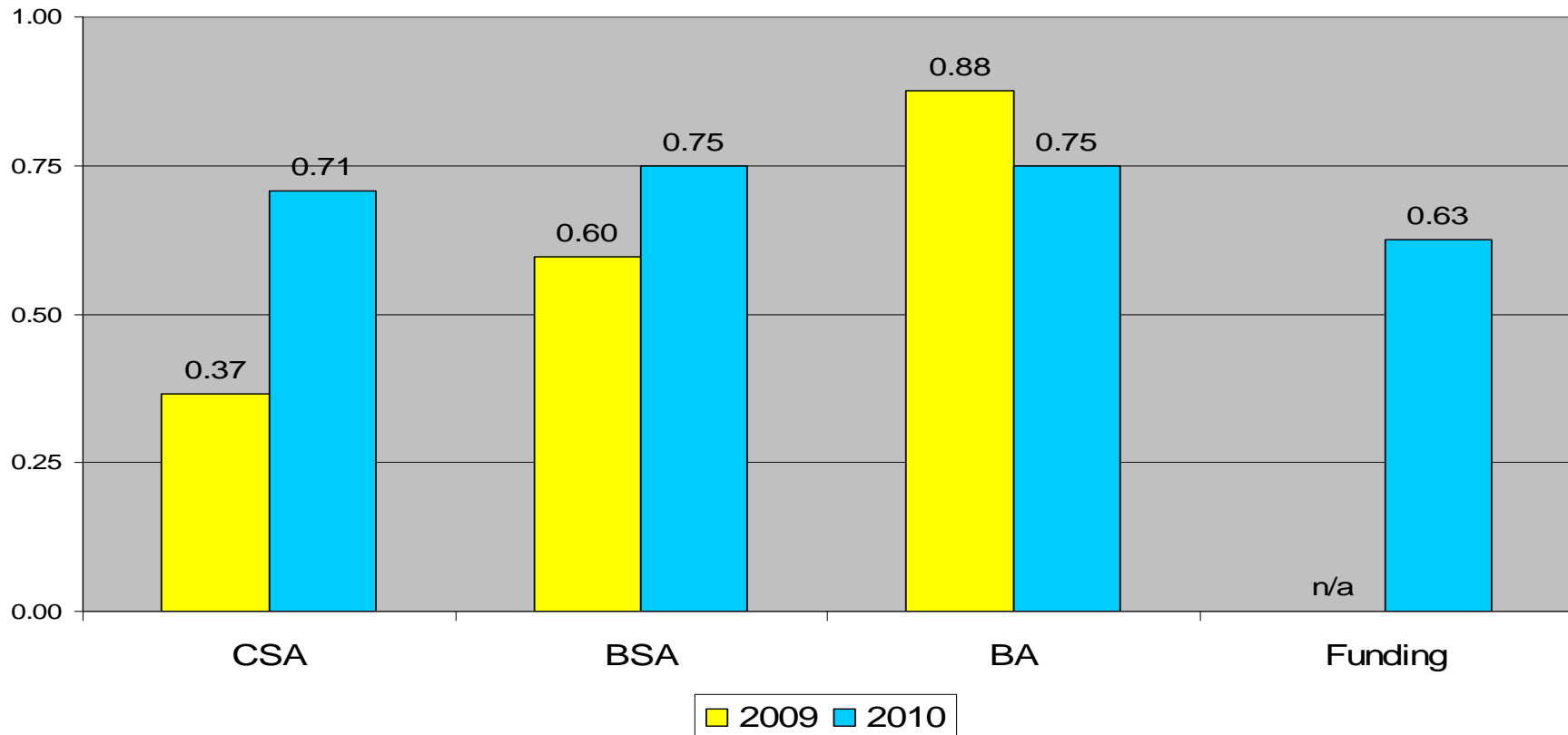
- Improvement in obtaining and managing data
- Variability reduced
- Still issues of value for customer



# In-depth diagnostic

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**LISTENING AND INTEREST**  
Dedicated time to understand needs and clarify priorities  
Genuinely interested in helping achieve business goals and dreams  
(0.5 = acceptable/0.75 = fully met)







# In-depth diagnostic

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- **Listening and interest**
  - Enthusiastic and engaging first contact
    - *CSA explained process, knowledgeable, not just an information taker*
    - *CSA handled the call efficiently, but also with warmth and friendliness*
    - *I was thanked during the conversation and felt I was listened to fully*
      - NB disproportionate sampling of 1 (very effective) CSA
      - 1 poor experience



# In-depth diagnostic

**RXP**erience

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- **Listening and interest**

- Supportive approach maintained throughout Business Link contact

- In the main all staff appeared well informed, displaying interest throughout contact

- *There were many questions raised that brought about serious and strategic change in the business plans. It was clear that X had a huge interest and concern for the business (BA)*



# In-depth diagnostic

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- **Listening and interest**

- Consistency a major improvement on 2009

- However, 'Funding' score raised by interaction with BA.

- Strong support and evidence of interest in outcome on behalf of customer by BAs

- Little actual interaction with NEEIC

- NEEIC considered distant and disengaged

- » Need for objectivity was understood, but approach not understood or valued

- » Lack of evidence of market or customer knowledge, with some 'arbitrary' comments and judgements

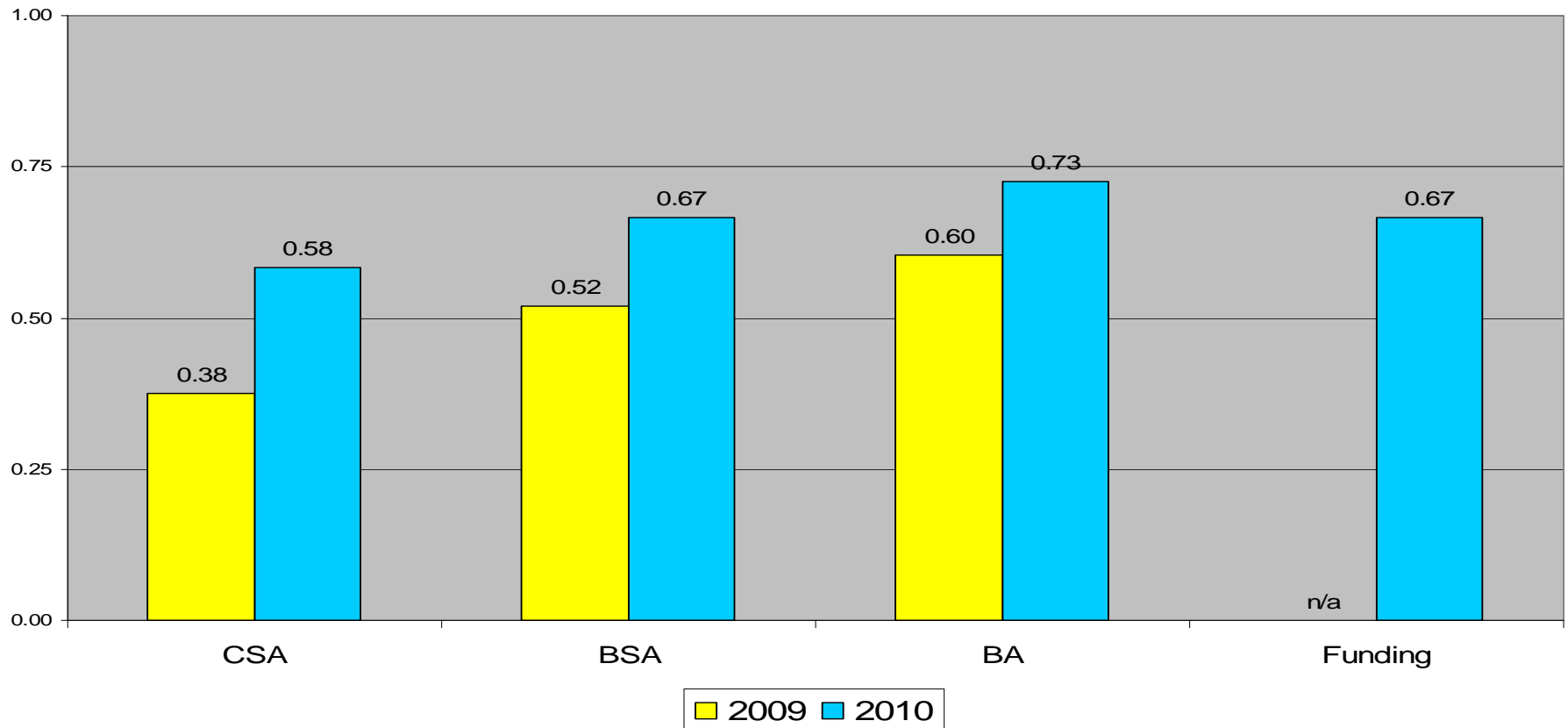
- » Process driven



# In-depth diagnostic

**RXP**erience  
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**PRODUCT KNOWLEDGE:**  
Had relevant information readily at hand  
(0.5 = acceptable/0.75 = fully met)





# In-depth diagnostic

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- **Product knowledge - improvements**
  - Overall an improvement in consistency across the service
  - Customer Service Advisor
    - Demonstrated knowledge and experience as to how process worked
  - Business Support Advisor
    - In the main well informed and knowledgeable
      - *X clearly explained why the source of funding we had hoped for had stopped, but proposed other sources of help through loans and funding (BSA)*



# In-depth diagnostic

**RXP**erience

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- **Product knowledge - improvements**
  - Business Advisor
    - Again considered well briefed as to customer enquiry and knowledgeable of Business Link support available and processes
      - *X gave a lot of insight into the system, I feel I fully understand it now*
      - *Although X requires specialist machinery and equipment (BA) had a fair grip on local suppliers, but more than that (BA) understood sources of finance and offered some creative ideas to help*
  - Funding Service
    - In the main well prepared
    - However, scores again raised by support of Business Advisor through the process



# In-depth diagnostic

- **Product knowledge - improvements**
  - Business Advisor
    - Again considered well briefed as to customer enquiry and knowledgeable of Business Link support available and processes
      - *X gave a lot of insight into the system, I feel I fully understand it now*
      - *Although X requires specialist machinery and equipment (BA) had a fair grip on local suppliers, but more than that (BA) understood sources of finance and offered some creative ideas to help*

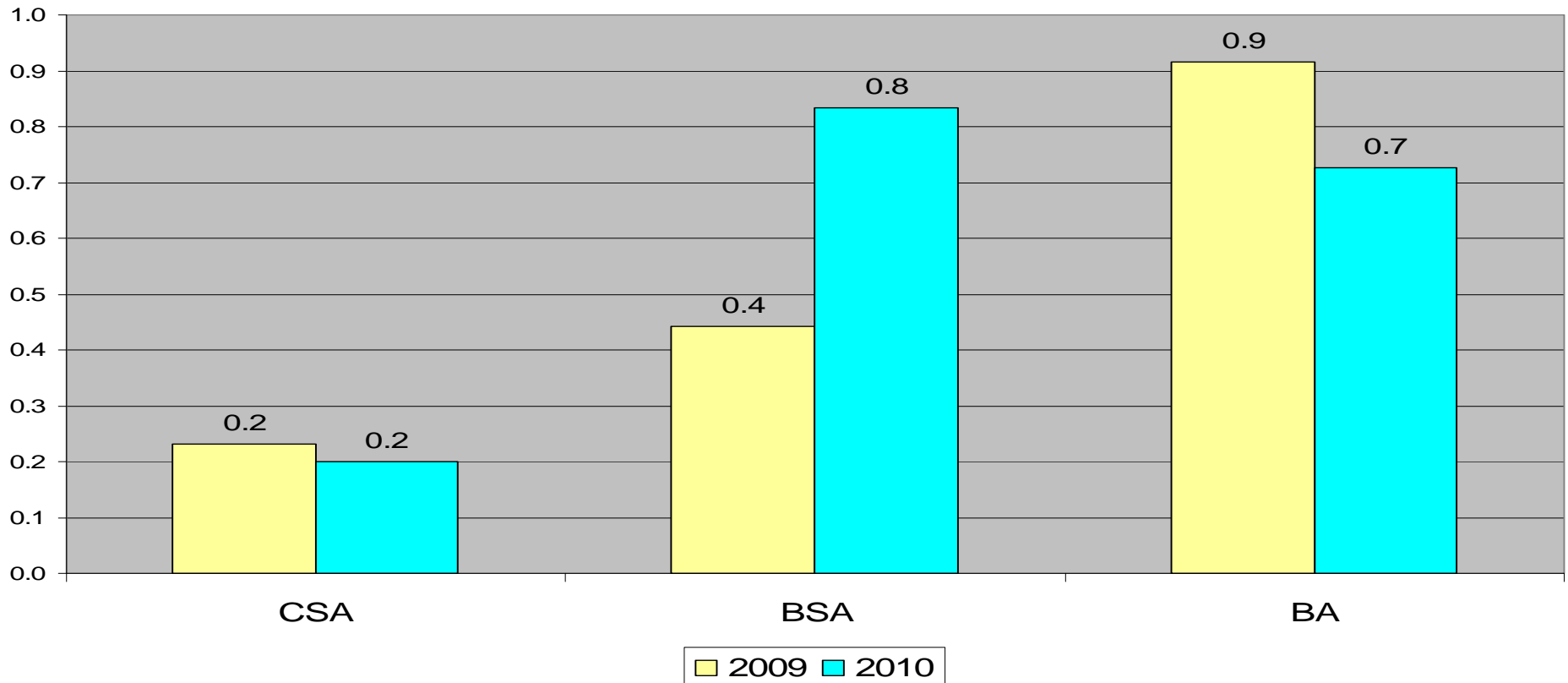


# In-depth diagnostic

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## ADDITIONAL SUPPORT

Offered additional information/highlighted additional resources/suggested other forms of support (1 = yes)







# In-depth diagnostic

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- **Additional support**

- Customer Support Advisor

- Additional support not considered necessary at this level
- Some examples of providing alternative sources of information (website)

- Business Support Advisor

- Major improvement on 2009
- In the main demonstrated good interaction with useful recommendations

- *X suggested looking at software support in addition to the training, this showed she had listened to what I'd been saying about the training and had thought laterally about other help I might need*



# In-depth diagnostic

- **Additional support**
  - Business Support Advisor (ctd)
    - *Provided considerable help with sources of finance beyond the high street banks*
    - *A follow up email which listed every large networking association in the North East, including those sector specific. This was very useful and I appreciated it*
  - However, a few suggestions considered inappropriate, demonstrating a possible lack of understanding of customer, their market and their needs
    - Drive to develop business plans, where to go to for help
    - Recommendations of inappropriate support
    - *I was pushed into going to events that I found were related to business in general, but not aimed at my specific business idea*



# In-depth diagnostic

- **Additional support**
  - Business Advisor
    - In the main a positive performance
    - A few customers felt little additional support had been offered, but the meeting had been focussed on their needs, so not necessarily a negative
    - Again some evidence of inappropriate recommendations
      - *After a great start felt let down by wrongly targeted support... aimed at giving network agencies work rather than what I needed*
    - However, Business Advisors scored 1 (i.e. the top score) in their support of customers in progressing funding applications.
      - Providing an insight into how funding worked
      - Providing valuable advice and support in funding applications



# In-depth diagnostic

- **Challenging**

	2009		2010	
	RM	AM	BSA	BA
Challenged thinking to help develop plans (0.5 = acceptable, 0.75 = fully)	0.35	0.63	0.38	0.65
Asked 'what else/what next'? (yes = 1)	0.48	0.65	<b>0.67</b>	<b>0.80</b>

- Consistent levels of challenge year on year
  - Not always felt appropriate at initial diagnostic level/for all customers
  - However, some positive results
    - *We were challenged as to plans, management style, image and structure in a positive and motivating way – that has led to considerable changes taking place since the meeting*
- Improved probing at initial diagnostic and in depth
  - Less issues with repetition 2010 on 2009



# In-depth diagnostic

- Added value of meeting with Business Advisor

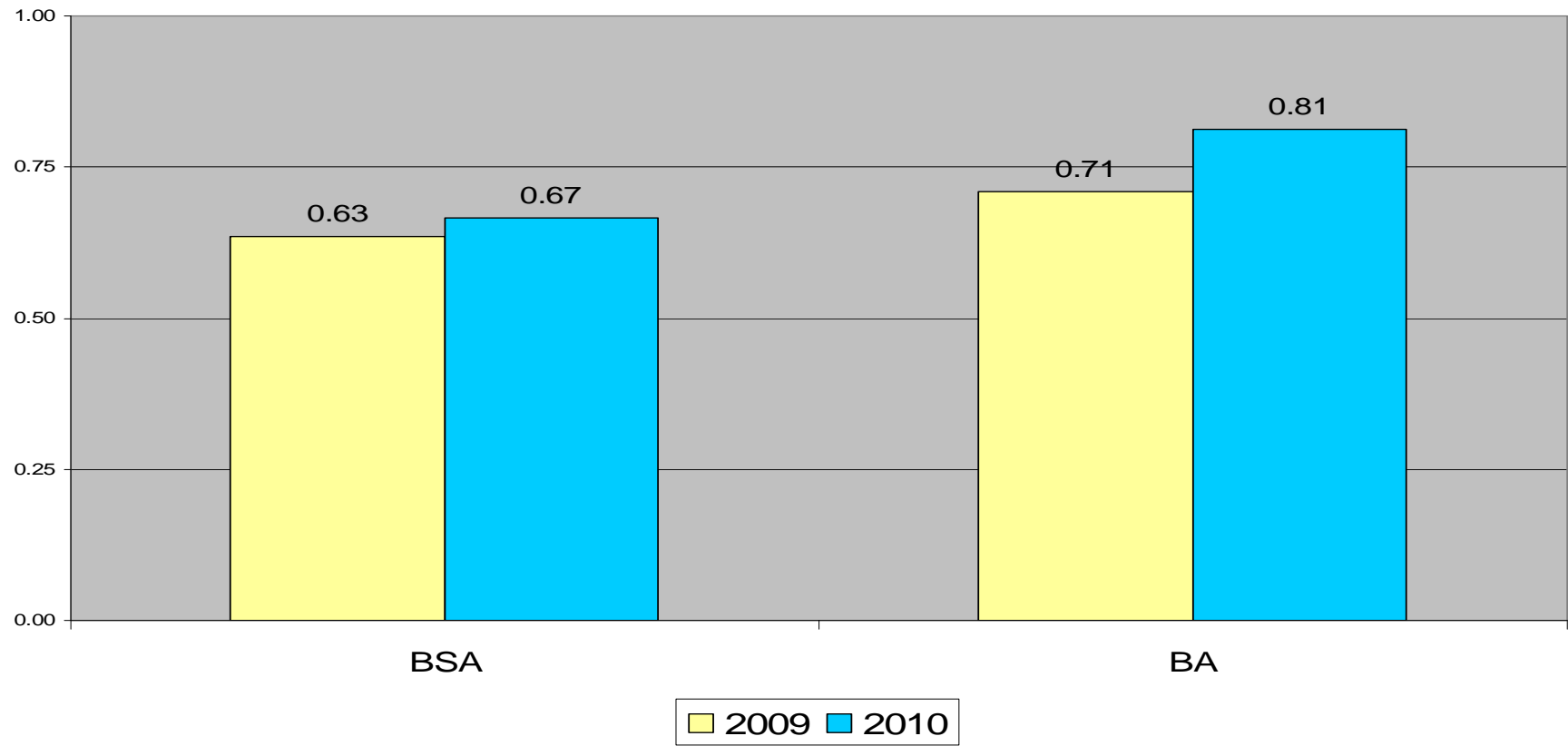
	2009	2010
Range: 0 = Not at all 0.25 = Minimal 0.5 = Acceptable 0.75 = Fully 1.00 = Beyond expectations	<b>0.9</b>	<b>0.8</b>

- Meeting with a Business Advisor still considered to fully add value
  - N.B. one bad experience impacted on scores



# In-depth diagnostic

**Ownership**  
(0.5 = acceptable/0.75 = fully)





# In-depth diagnostic

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- **Ownership**

- Evidence of high levels of ownership

- Business Support Advisors and Business Advisors doing what they promised within a short time period, as in 2009

- *X (BSA) offered his direct phone number early in the conversation and, on calling back with venue details, repeated the assertion I should call him at any time with any queries or problems. This level of interest and knowledge was more detailed than last year's discussions and I felt more confident in the telephone advisor's knowledge*

- *X (BA) provided us with his contact details and urged us to keep in touch with him for further mentoring and advice, above and beyond the final application for funding that formed the outcome of the meeting*



# In-depth diagnostic

- **Ownership**
  - Evidence of high levels of ownership (ctd)
    - BAs demonstrating their commitment to their customer by working hard to ensure their needs are met, particularly when applying for funding
      - Scores of 0.9 for Business Advisors when managing funding applications
      - However, ownership was queried when advice on funding, in particular, was proven to be incorrect
    - Less evidence of barriers between departments in Business Link
      - Although evidence of strong barriers between Business Link and NEEIC





# In-depth diagnostic

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- **Ownership**

- However, when it does go wrong...

- Still evidence of some chasing required by customers

- Some lack of follow up

- If at first you don't succeed at granting your customer's requirements – give up!

- » *At the time (BL – BA) was 100% eager to help. Lack of follow through severely damages this perception*

- Particularly an issue when time and information shared by customer with Business Link results in no benefit/inaccurate/inappropriate recommendations

- Considered unprofessional behaviour and not in keeping with ethos of private sector



# In-depth diagnostic

- Confirmation and Close

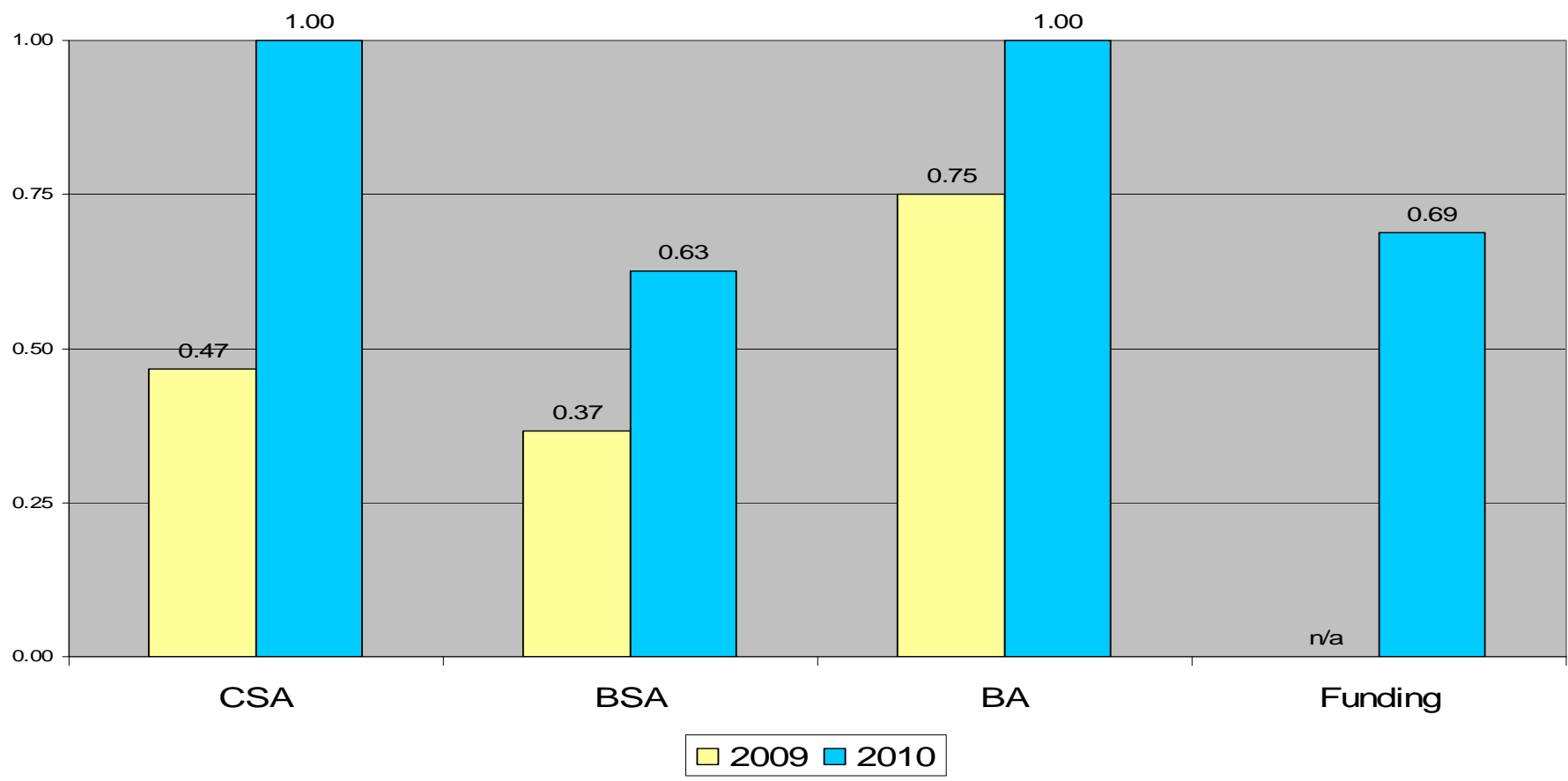
		CSA	BSA	BA	Funding
Confirmation (summarise what has been agreed /next steps)	2009	0.8	<b>1.0</b>	0.9	n/a
	2010	<b>1.0</b>	<b>1.0</b>	0.9	n/a
Close (thank and close appropriately)	2009	0.6	0.9	<b>1.0</b>	n/a
	2010	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>

- Yes = 1
- Weakness of initial contact now overcome
- Consistently high performance



# In-depth diagnostic

**Resolution**  
(0.5 = acceptable/0.75 = fully)





# In-depth diagnostic

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The big picture for Call Centres

- **Resolution**
  - Significant improvement on 2009
    - Better handovers
    - Better transfer of information
    - Greater management of expectations



# Findings

In-depth diagnostic

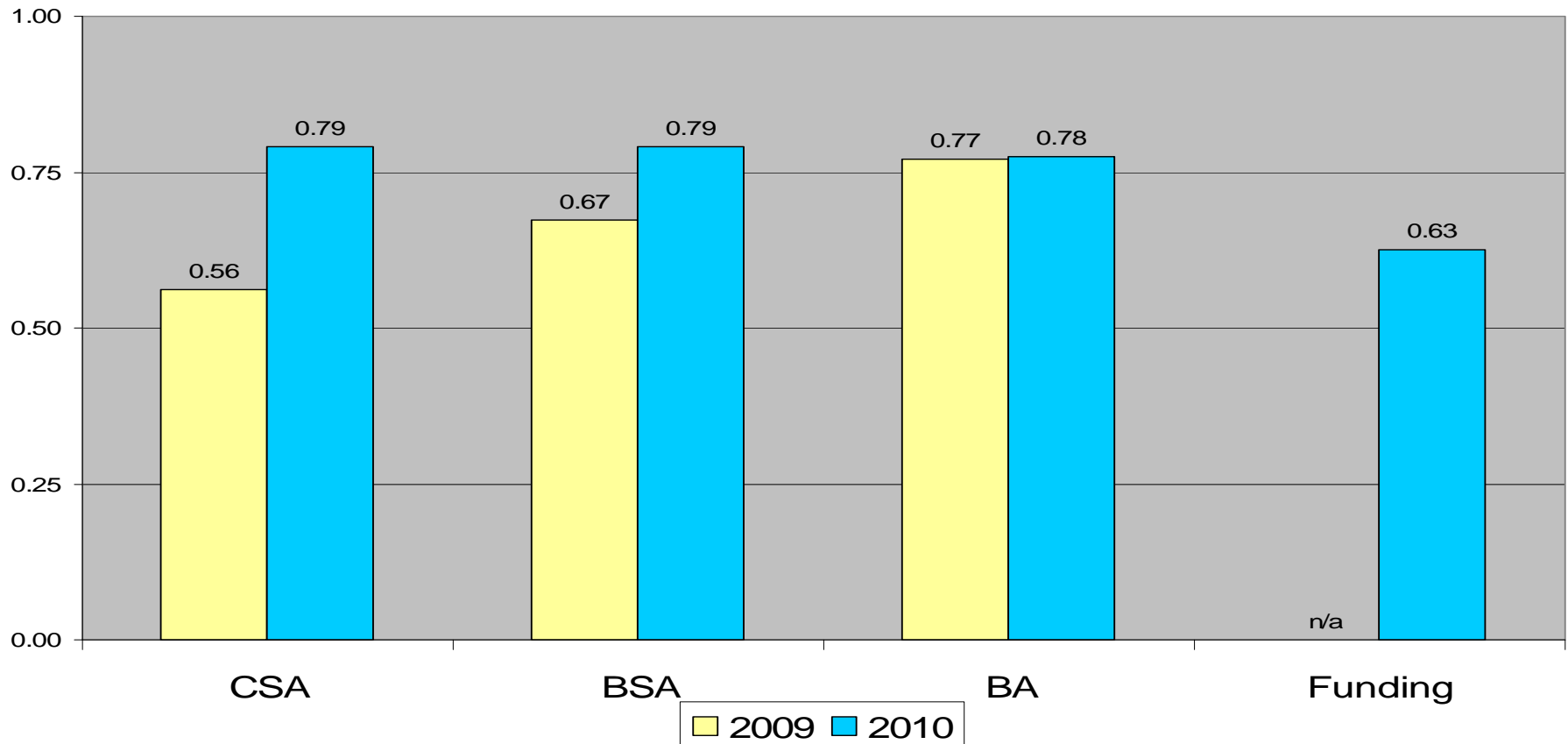
The overall experience



# In-depth diagnostic

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**Values - Professional**  
(0.5 = acceptable/0.75 = fully met)





# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- **Values - Professional**
  - Improvement in consistency across the service
  - Continued good performance by Business Advisors
    - Key for Business Advisors:
      - Appropriate market knowledge
      - Wide range of business expertise
      - Good (Business Link and wider network) product knowledge
      - Being well prepared for meetings
      - Behaving in a professional manner
        - » In line with market and customer expectations



# In-depth diagnostic

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- **Values - Professional**

- Potential areas for improvement:

- For some, not all:

- Being able to demonstrate an understanding of business timetables and pressures
- Importance of relevant market knowledge/experience

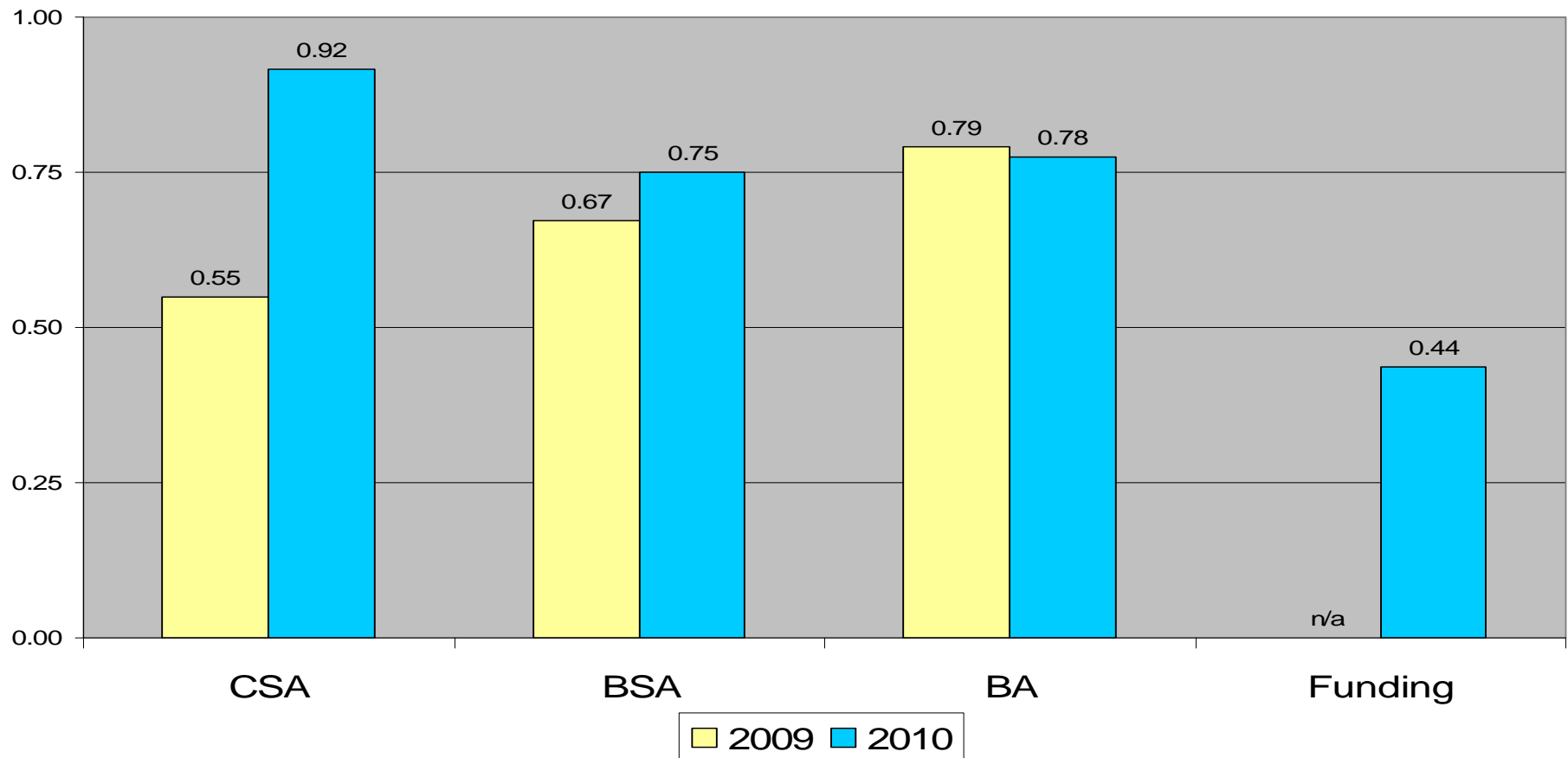




# In-depth diagnostic

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**Values - Approachable**  
(0.5 = acceptable/0.75 = fully met)





# In-depth diagnostic

- **Values - Approachable**

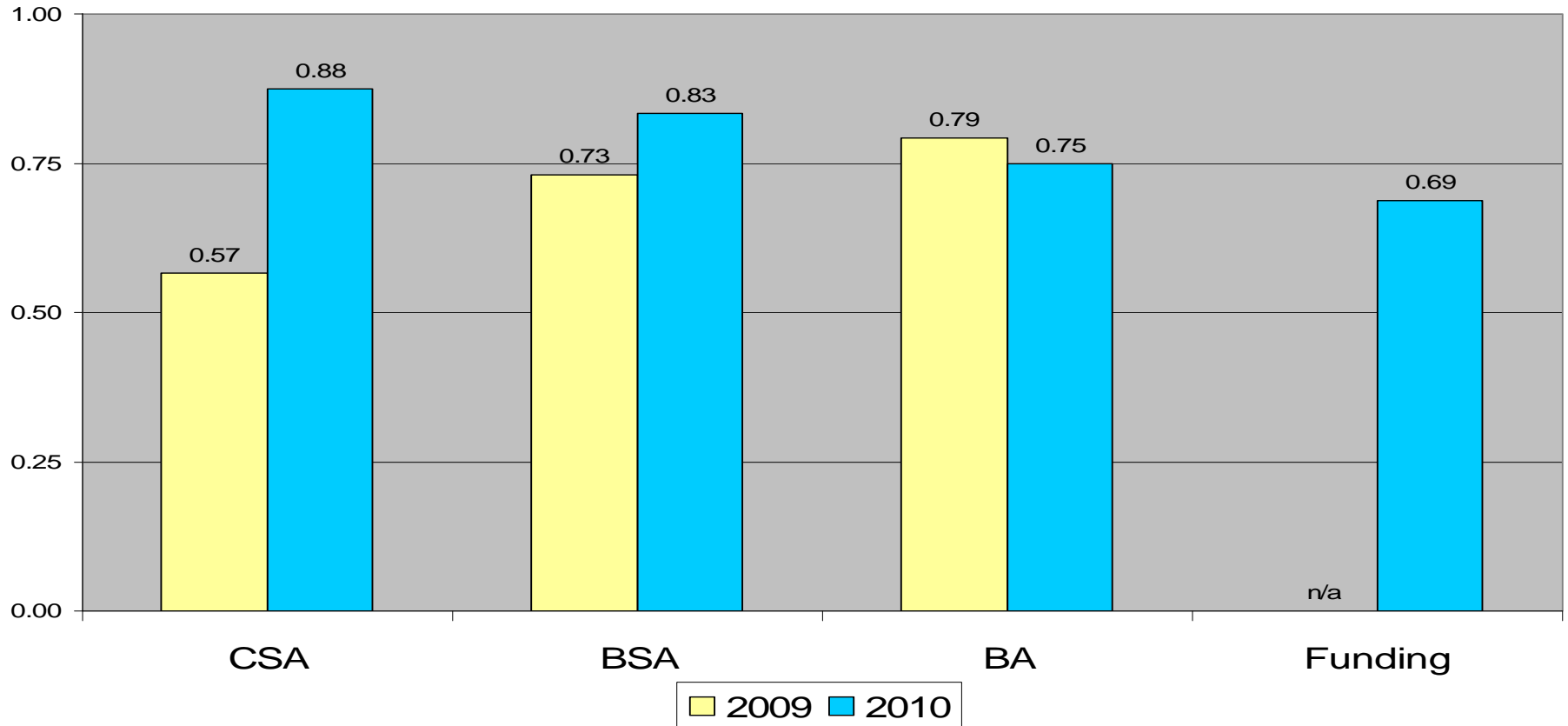
- Again demonstrated improvement in consistency across the service
  - BL has a 'star' in customer services!
- Overall positives:
  - Straightforward language
  - Relaxed, enthusiastic, friendly and flowing conversations
- Possible area for improvement
  - To be more succinct with some customers
- Key issue:
  - NEEIC - complex and time consuming processes and forms



# In-depth diagnostic

**RXP**erience  
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**Values - Respectful**  
(0.5 = acceptable/0.75 = fully met)





# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

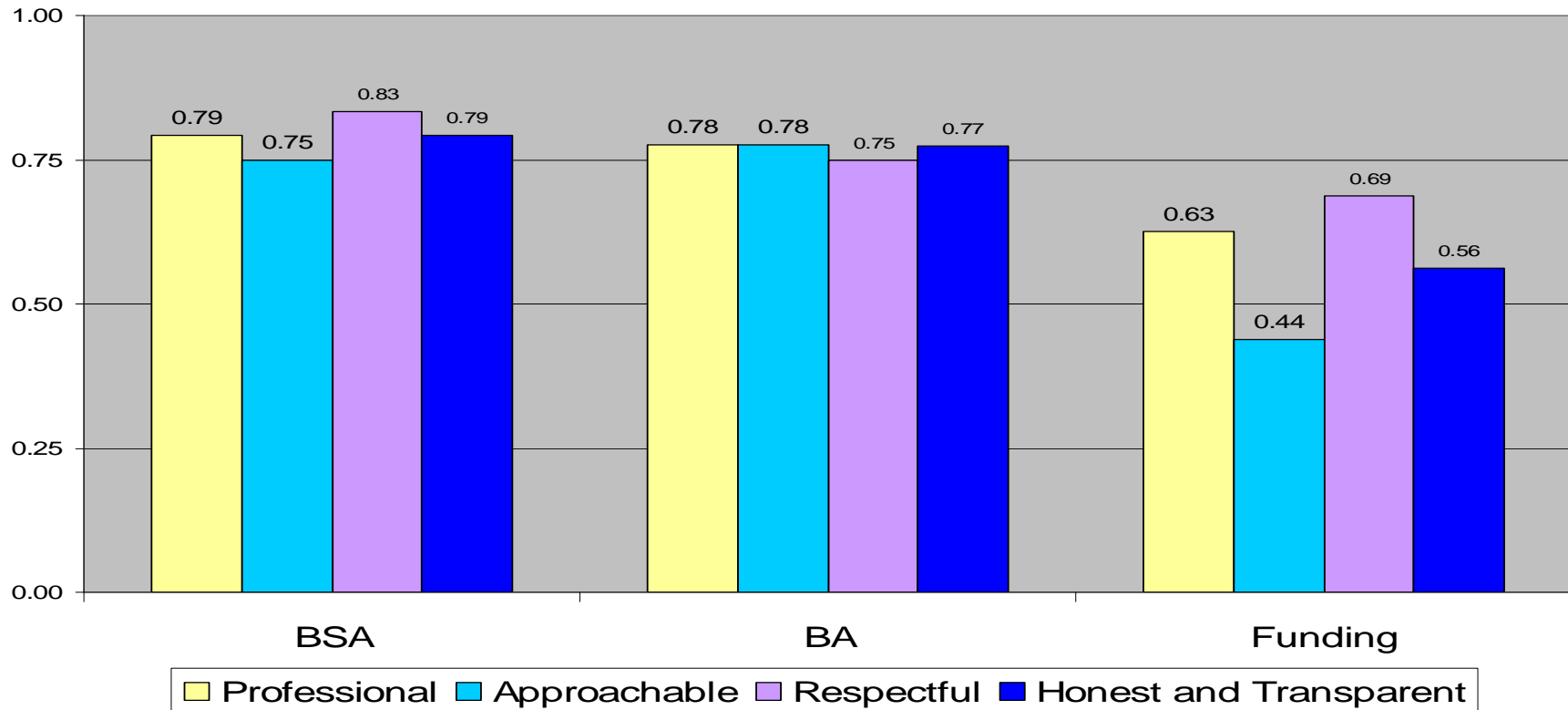
- **Values – Respectful**
  - Again improvement in consistency across the service
    - Courteous call handling
    - Demonstration of respect for customers' focus and constraints
    - Ideas and suggestions treated with respect
    - Customers' time treated as valuable



# In-depth diagnostic

**RX**Perience  
The big picture for Call Centres

**Values - Overview 2010**  
(0.5 = acceptable/0.75 = fully met)





# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- **Values**
  - Lower performance for NEEIC
    - Particularly for ‘approachability’ and ‘honesty and transparency’
    - Respondents do understand the need for safeguards and objectivity in awarding funding
    - But are discouraged by perceived bureaucracy, opacity, variability and subjectivity
      - *Business Link has a difficult remit, businesses that would benefit from their help are too busy to be bothered with all the layers of support and the direction the support takes them*



# In-depth diagnostic

- **Values**
  - NEEIC: perceived opacity, variability and subjectivity
    - Changeable criteria?
      - Initiatives versus support?
    - What is the relationship between Business Link and NEEIC?
      - How can Business Link minimise wasted time and effort on the part of applicants?
      - *There is a frustration with the long procedures and 'secrecy' set in place by North East Investment Centre*
      - *Our advisor was responsive, however, we had to provide so much information for so little return*



# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- **Values**
  - What are the criteria for funding?
    - Who receives what funding and why?
    - Why such disparity in judgement?
      - » Variability in percentage awarded
      - » Variability in sums awarded
      - » Variability in type of support receiving funding?
  - = Perceived 'magic' numbers, phraseology and sectors





# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

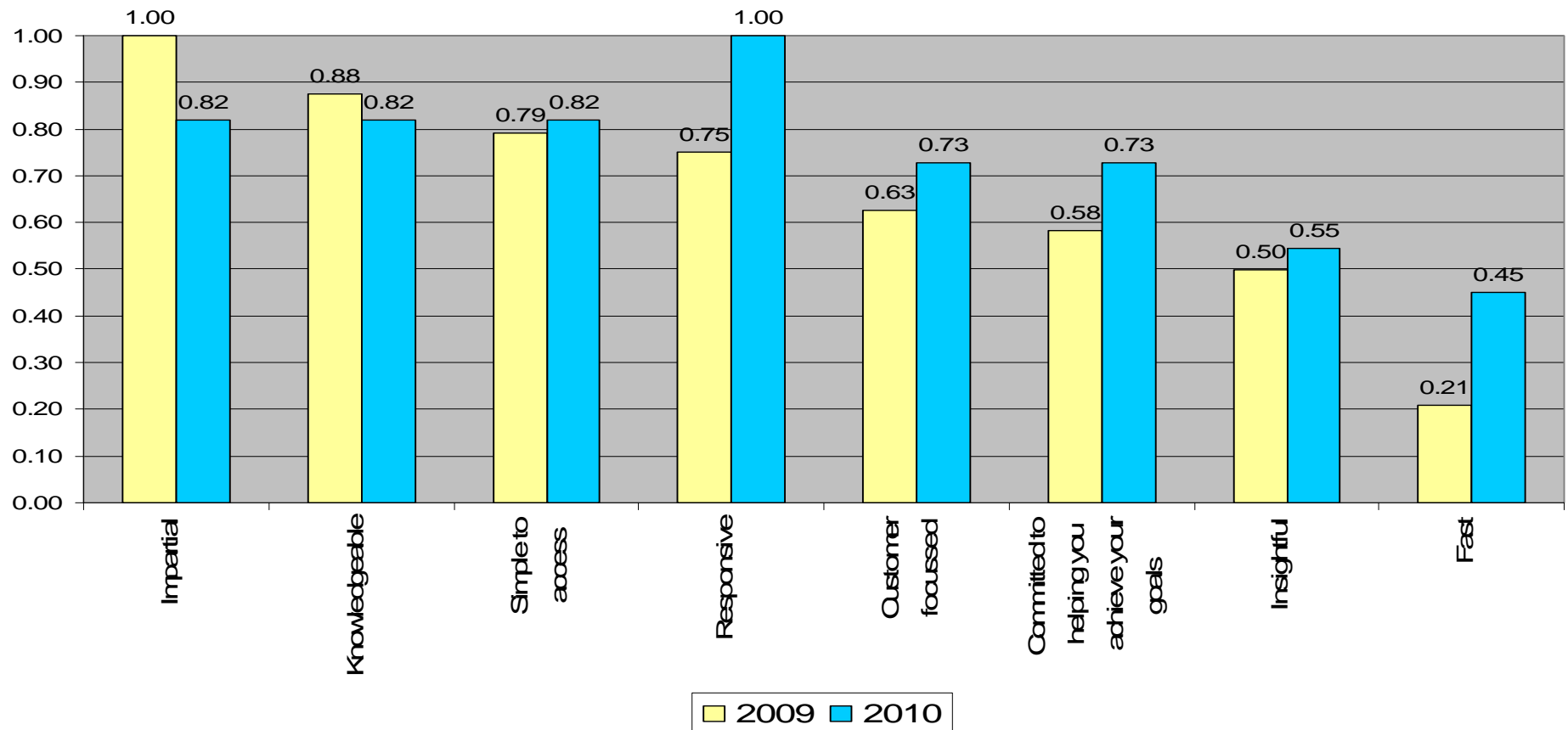
- **Values**
  - NEEIC is also considered to demonstrate a lack of understanding of market conditions and business
    - Complex and time consuming processes
      - *How is that helping small businesses? Cash flow is crucial*
      - *The smaller guy has to move quickly to beat the bigger guy*
    - Onerous and 'inappropriate' evaluation and reporting



# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

**Overall, Business Link is:**  
(yes = 1)

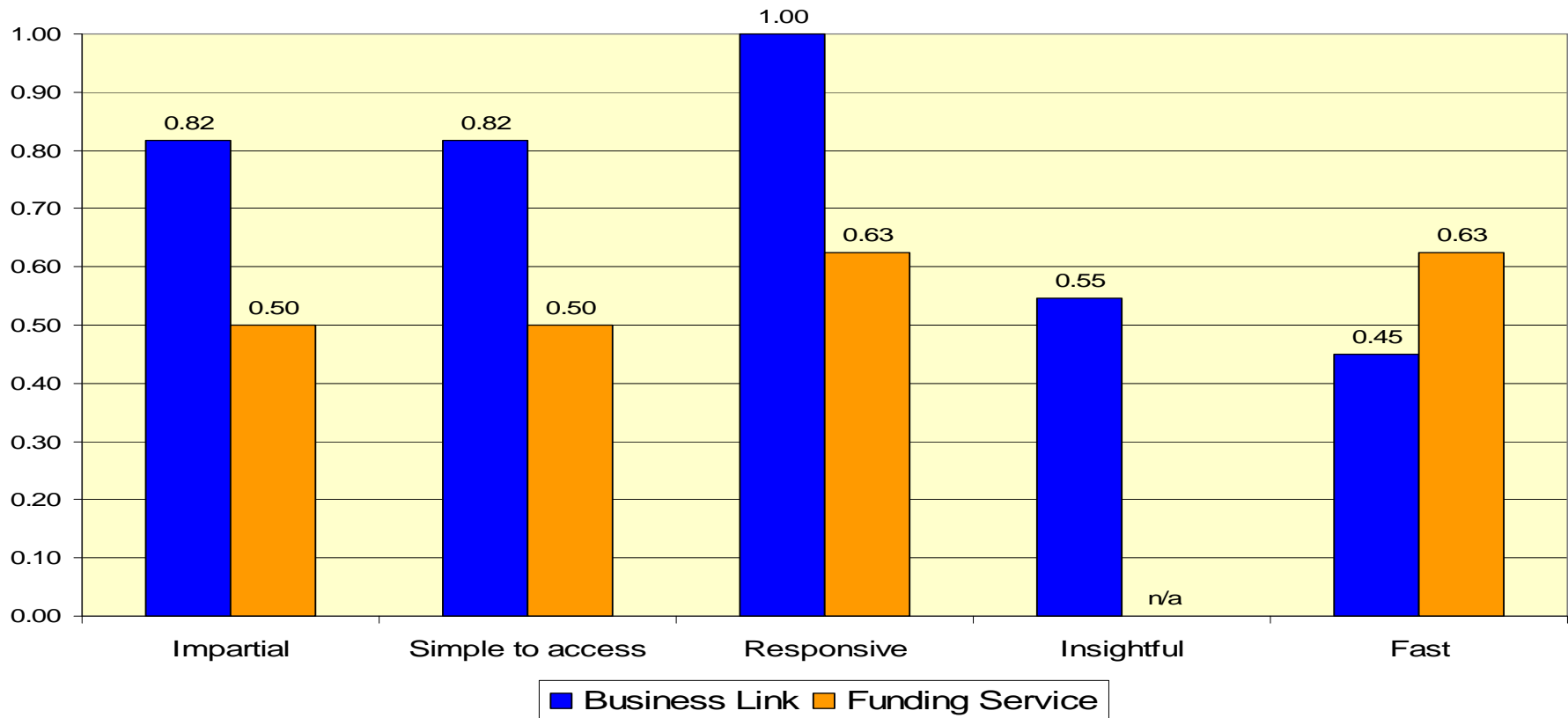




# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

**Overall, Business Link and Funding Service 2010:**  
(yes = 1)

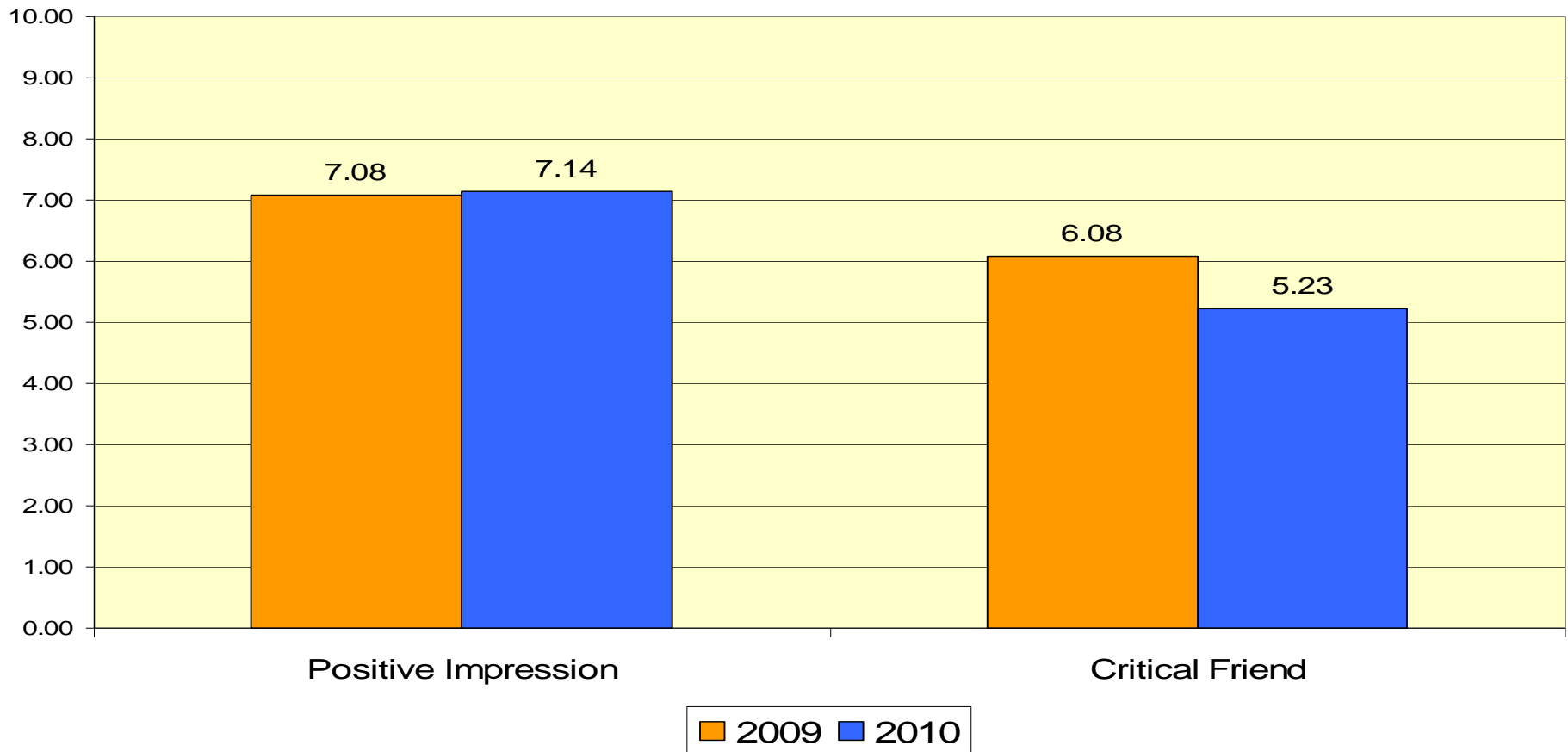




# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

**Overall**  
(out of 10)





# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- Overall impressions against identified service criteria
  - Improvements in customer focus and responsiveness for Business Link
    - Still room for improvement in speed of service
  - Overall improvement noted by repeat ‘shoppers’ from 2009
  - Slight drop in impartiality
    - Business Link is expected to be impartial in judgement, but not in advice
    - A key factor identified in 2009 survey
    - Business Link was expected to demonstrate added value via expertise rather than be a ‘list broker’



# In-depth diagnostic

- Overall impressions against identified service criteria
  - Perceived key strength
    - People
  - Perceived key weaknesses
    - Bureaucracy and focus on Government requirements at expense of business needs
      - Processes, systems and some support considered internally focussed
      - *Need to lift their heads and look at the needs of their customer base*
      - *Institutionalised*
    - Some evidence of supplier driven



# In-depth diagnostic

- Overall impressions against identified service criteria
  - Funding service is outperformed by Business Link
    - With commentary indicating scores are raised by the Business Advisors' input to the funding process
    - Without this the Funding Service would be judged less favourably
      - *BL advisor good, but NEEIC paperwork and processes NOT. Slow, caused delays and criteria changed in meantime.*



# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- Overall impressions against identified service criteria
  - NEEIC
    - *Even the business advisors are uncertain how matters are judged, and clearly have no influence over the outcome. This decision making process seems to be made by an individual within the NEEIC and explanations of the scoring are not made public. Appeals or requests for more information are met with a vague response along the lines of 'the candidate failed to satisfy our criteria in some sections'. There seems to be evidence of some discrepancies between almost identical applications for funding, which, in the absence of any explanation, must be assumed to be due to partiality on behalf of the staff member involved.*





# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- Overall impressions against identified service criteria
  - NEEIC
    - *There is a considerable time delay between applying and receiving funding which can cause cash flow issues for small businesses that they are attempting to help. The criteria for applying for funding is highly restrictive and could be seen as off putting for businesses without an experienced administrator who can spend the time on the application.*
    - *It's the system - partly processed (our application) quickly, then it was ignored for a 1 month so we lost window of opportunity - but (NEEIC) want their findings/evidence quickly*



# In-depth diagnostic

- Overall impressions against identified service criteria
  - NEEIC
    - However, when all factors work, the NEEIC is perceived to be fast and efficient.



# Conclusions



# In-depth diagnostic

- **Conclusions**

- Business Link has achieved significant process improvement since 2009 survey
- Key areas of weakness in systems and customer interaction have been overcome
  - Improved listening, interest and product knowledge amongst CSAs
  - Initial contact and BSAs demonstrating enthusiasm, efficiency and customer focus
- The service is now much more consistent
  - Repeat 'shoppers' have noted this improvement
- Business Advisors continue to be valued for their relationship building skills
  - And for acting as 'interpreters' with the NEEIC



# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

- **Conclusions**

- Some areas of potential improvement:

- Bringing all customer 'experiences' up to the same level

- Market and customer expertise

- » Recognising Business Link can't cover every aspect!

- Maintaining private sector, versus perceived 'institutionalised' approach

- » Every penny counts

- » Time is money

- » No guaranteed income for the self employed



# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

- **Conclusions**

- Some areas of potential improvement:

- Treating customers more consistently?

- Confident and experienced 'shoppers' still achieve more than the young/inexperienced

- Customers require knowledge of the Business Link 'market' to achieve optimum relationship

- » Those with more time and resource (less need?) can achieve more



# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

- **Conclusions**

- Some areas of potential improvement:

- Treating customers more consistently (ctd):

- Key success criteria for customers:

- » Confident

- » Mature attitude

- » Experienced

- » Knowledgeable of the business support market (and appropriate suppliers)

- » Connected.

- » Have resource available to work with Business Link and NEEIC



# In-depth diagnostic

**RXP**erience

The big picture for Call Centres

- **Conclusions**

- Overall, Business Link has achieved a lot
  - In the main Business Link achieves ‘acceptable’ or ‘fully met’ scores for the key attributes valued by customers
  - For the majority, Business Link is considered:
    - Professional
    - Approachable
    - Respectful
    - Honest and Transparent
    - To have good listening skills, be responsive, demonstrate good product knowledge and added value, taking ownership of customer queries and exceeding expectations in terms of resolution





# In-depth diagnostic

- **Conclusions**

- Customer ‘delight’

- As with the 2009 survey, when Business Link gets it right it can exceed expectations
  - *Excellent in all areas, business experience combined with accountancy, marketing and a wide range of funding options*
- The 2010 survey shows Business Link getting it right more often!
  - *Made the business feel important and that the skills and revenue it maintained were highly valued by (BA) and the local economy*



# In-depth diagnostic

**RXP**erience  
The big picture for Call Centres

- **Acknowledgements**

- We would like to thank the following for their assistance in recruitment:

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**RXPerience**

The big picture for Call Centres

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