

Case Study – Taking planning to a new level at Nationwide Direct

The latest employee survey results show an 18% uplift in satisfaction within the planning and support team. Crucially, team members reckon that their learning and development has improved considerably – rating it 28% better than at the end of 2008. Alex Coxon investigates.

When Steve Trott, head of planning and support, joined Nationwide Direct in March 2007, he decided to introduce a new format of training and development for the planning team within his division.

Many of the team members had been recruited to the Swindon-based team from other parts of the building society's contact centre network and this therefore presented Trott with the ideal opportunity to implement a new

“The idea behind the team manager training was to give them an insight into what planners do and what role they – as team managers – play in making planning successful,” says Trott.

“The courses provided team managers with a basic education about scheduling, real-time planning, reporting and hotspots... We also showed them how planning systems work and used them to demonstrate the impact it can have

department.

At the same time, Trott and the Professional Planning Forum used the results of their earlier training needs analysis to build a bespoke, structured training programme for the planning division itself.

This package of training began with an introduction to contact centre planning for the division's real-time analysts and resource schedulers, aimed at giving them a comprehensive grounding in, and uniform approach to, forecasting, scheduling and real-time analysis.

“We put 14 people through that initial training in order to raise their level of understanding and their confidence,” says Trott. “We then created and ran specific courses around management information (MI) and performance analysis... to ensure our MI team really understood what people's requirements were and that they were providing the right volume of appropriate data in return.”

At the time, two of the more experienced members of the department started undertaking the Professional Planning Forum's Foundation Certificate – a recognised qualification combining formal classroom learning with mentoring, practical project work and dialogue with peers in planning functions in other organisations.

However, since Nationwide Direct began working with the Professional Planning Forum in 2008, a further four individuals have been earmarked to go through the formal

Team manager training gave them insight into what planners do. Two of the planners started the Foundation Certificate in Contact Centre Planning

formal training programme to help them better understand their role and the importance of their function.

To assist with this, Trott called upon the Professional Planning Forum to help him develop this training programme aimed not only at providing structured learning for the planning division itself, but also at further educating the 120-strong body of team managers that worked across Nationwide Direct's five contact centres.

The project commenced in the summer of 2008 with a training needs analysis devised to evaluate the skill-sets and capabilities of every individual within the planning division. At the same time, the Professional Planning Forum instigated a six-month programme of one-day training courses for each of the 120 contact centre team managers.

on a contact centre network if team managers remove even a small number of people [from making frontline calls], where other team managers are making similar actions in another centre.”

In addition to this, a portion of each day-long course was spent giving team managers an introduction to planning and analysis terminology.

“We wanted them and the planning team to have a common language that would enable them to understand one another better and work more effectively together going forwards,” says Trott.

While these courses were ongoing, two further learning sessions were implemented to provide more senior managers and heads of departments with their own overview of the planning



accreditation scheme.

And the development hasn't stopped there. Trott says that the two organisations continued to work with one another on the training programmes throughout 2009 and plan to maintain the momentum in 2010.

"The planning and support team has grown since 2007... [so] we've got another seven people scheduled to attend a real-time workshop in 2010, 11 people who are set to attend an effective scheduling workshop, and 26 people who will attend an analysis workshop," he states. "There will also be a long-term planning training session for a small group of people."

But what impact has this all had to date on Nationwide Direct? For his part, Trott is delighted with the results as he has witnessed an increase in confidence and proficiency within his team.

"People have a much clearer understanding of their roles now and are working much more efficiently and effectively," he says. "At the same time, it's helped raise [the planning division's] profile

People now have a clearer understanding of their role and are working more effectively

within Nationwide Direct as a whole. They now have greater credibility with team managers, which has really helped communication."

Team manager Lesley Gully agrees. "The training we went through [in 2008] gave us a wider understanding of what planners and forecasters do, and why it's important to plan ahead... It helped us see the bigger

picture," she says.

Now they have that insight, Gully believes that team managers actually dedicate time within their shifts to observe call flow volume and abandonment rates, and to communicate with the planning and support team to ensure service

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levels are maintained at the optimum level.

Eddie Fiore, forecast and capacity analyst, is certainly seeing the benefits of this. One of the first two people from the planning and support team to undertake the Professional Planning Forum's Foundation Certificate, he asserts that the ongoing training programme has made life easier for everyone in the contact centre network.

"People now have a better understanding of why we make the decisions we do – why we schedule people in the way we do to answer

the phones," he says. "We're now seen as the experts."

Planning and support manager Mike Blake is equally satisfied with the programme. "People come to us for guidance now... even people from outside Nationwide Direct, in the wider company," he says. "They now realise the complexity that lies behind a planning and support function is far greater than when you first scratch the surface, and

this has created greater confidence within the team."

Reflecting that confidence, are the findings of Nationwide's employee engagement survey. The latest results of this show an 18% uplift in staff satisfaction within the planning and support team. The same survey

reveals that the team now feels 15% more committed to Nationwide Direct than it did six months ago, and believes that communication is 18% better. Crucially, staff within the team reckon that their learning and development has improved considerably – rating it 28% better than at the end of 2008.

Ultimately, Trott's team – with the guidance and encouragement of the Professional Planning Forum – has taken planning to a whole new level in Nationwide Direct. "It's been an empowering event," he says. "Our people are now working more effectively together towards our common purpose: making sure we provide an excellent service to our customers. And really, that's what it's all about."

Report by **Alex Coxon**.
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