

Case Study

- Training Consultancy for Financial Services Call Centre

Background

A national financial services organisation developing a new department with the objective of retaining more client business. Retained business had been reducing significantly due in part to the current financial marketplace conditions.

The Solution

We delivered a training consultancy project involving a full training needs analysis (TNA) for all the affected roles within the new department. This involved structured questionnaires, interviews & focus groups. We designed the learning solution & then delivered training to the various audience groups & finally evaluated the success of the project. The department comprised over 90 people in total fulfilling 6 different role positions. The training incorporated:

skills development, product knowledge, compliance knowledge, systems knowledge, process knowledge & competency assessment.

Team coaches within the department received coaching training to support call handlers back in the call centre. Team leaders received leadership skills training.

Results

Results were measured at several levels e.g. immediate reaction of delegates to the training, learning achieved, changes in behaviour, retention figures. Measured over the following six months, retention figures improved by over 45% & positive results were achieved at all measured levels.

This training consultancy project was submitted for a National Training Award & achieved regional finalist status.

EyeJbee Limited
1 Newton Manor Close
Birmingham
B43 5JZ

Tel: 0121 357 3996
Mob: 07740 982212

Email: irene@eyejbee.co.uk
Web: www.eyejbee.co.uk