



Financial Services Enterprise-wide Implementation Results in Dramatic Improvements in Customer Care

A leading international financial services company, providing a diverse range of protection and wealth accumulation products and services to individuals and corporate customers hired DB&A for multiple engagements. After the first successful project, DB&A worked alongside front-line managers in eight additional projects helping them improve quality, service, and productivity in Call Centers, Claims Processing, and Shared Services throughout Canada.



The DB&A Difference

Combined Actual Financial Results

- Annualized Savings: \$26,500,000
- 145% of Guaranteed Savings

Front-line Supervisor Quote

"...by having access to and relying on various reports and credible, correct information, I have a holistic view of my team. We are able to see all the areas that impact performance and fill gaps that may exist before they result in costly errors."

The client desired to become more competitive in the marketplace and achieve a vision of being recognized for world-class customer satisfaction, employee satisfaction and operational excellence by:

- Improving the operational effectiveness of front-line managers
- Improving the effectiveness and efficiency of call processes and service delivery
- Improving the quality of service delivery
- Decreasing costs because they were 20 percent higher than their competitors

Implementation Actions

To help the client achieve their goals, DB&A focused on the following areas:

- Resource management/allocation
- Team leader coaching and time management
- Management and team organization
- Workforce skills development
- Metrics and reasonable expectations
- Workforce accountability
- Problem identification and resolution

Through a proven process which is executed by “in the trenches” side-by-side coaching and classroom style training, DB&A Consultants helped the Client understand key issues and improve performance.

Additionally, DB&A helped the Client’s staff improve their knowledge and skill sets through the utilization of metrics. By and large, the Client’s leadership team learned to support their respective staff members by proactively identifying improvement opportunities, ensuring the development and implementation of solutions, communicating effectively and sustaining the change.

Project Results

Managers and Supervisors experienced a substantial number of behavioral changes including:

- Resource management/allocation
- Recognizing that morale is a large component of employee performance, Supervisors, Managers and Directors added positive reinforcement to balance work and having a good time at work
- Supervisors/Managers utilize dashboards to evaluate weekly and long-term performance and develop plans to resolve issues on the floor Supervisors/Managers are empowered to effect change outside the boundaries of their departments
- Supervisors/Managers take immediate action when confronted with problems
- Supervisors discuss challenges and solutions in the Daily Accountability Meeting providing a forum for ideas and improvement as a team

All nine projects improved operationally which resulted in 145% of guaranteed savings or \$26.5 million in total annualized savings. Each project’s success was driven by the Client’s leadership, commitment, ownership, and pure hard work.



Since 1987 DB&A has provided cross-industry management consulting delivering 15-20% in operational and financial improvements to our clients with a financial guarantee. We deliver customized solutions that maximize existing resources to increase efficiency, capacity, and productivity. Our approach is to work with all levels of management to transform management culture in order to drive accountability where it matters most: the front-lines. For more information visit www.dbareresults.com or email contact@dbareresults.com