1. **INTRODUCTION**

The starting point for this transformation project was the realisation that as Link has grown and evolved, the organisational approach to meeting the challenges of significantly larger volumes of customer contacts and demands, along with an increasingly difficult external environment, has not included creating the capacity to be able to stand back and review current practice through the lens of business improvement. Everyone is busy. There are excellent skills and knowledge across the teams that we need to harness and develop. Our teams and colleagues know best in terms of what’s not working and their frustrations about some aspects of our service performance have been evident throughout the discovery phase of this review.

Despite everyone’s best efforts it became apparent that we would benefit from a fresh pair of expert eyes on our current systems, processes, procedures and digital solutions with a view to working with colleagues to enhance efficiency, effectiveness and improve our customer's experience of their contacts with Link.

The initial drivers for the need for this project focused on some key performance issues:

* Reducing call volumes
* Reducing call waiting
* Increasing our customers engagement with other communication channels (encouraging them to see the benefits of on-line, digital communications)
* Enabling customers to book a repair, get an appointment, get it done first time and the customer being kept up to date with progress of the repair
* Eliminating double call handling
* Eliminating customers being passed from pillar to post
* Eliminating the need for chase up calls from customers
* Reducing complaints which are a result of service failure of poor communication

Key Objectives

* Enhance Customer Experience: Improve accessibility, response times and satisfaction through seamless interactions across all channels.
* Increase Operational Efficiency: Leverage automation, integrated systems

and skills-based routing to reduce customer service bottlenecks.

* Reduce Costs: Consolidate customer interaction platforms, eliminate

redundant technologies and optimise staffing through workforce management tools.

* Data-Driven Decisions: Use analytics to optimise processes, improve

resource allocation and predict customer needs.

1. **Process**

Key Focus Areas

* Process Optimisation: Ensure that the processes across both the general service and repairs functions are streamlined to deliver a consistent and efficient customer experience.
* Automation and Self-Service: Increase efficiency by automating routine tasks, allowing agents to focus on more complex queries.
* Consistency Across Channels: Ensure that processes are standardised across all communication channels; phone, email, chat and social media.

Customer Hub Uniﬁcation

Unify customer service and repairs centres into a single Customer Hub using a CRM, CCaaS and omnichannel solution.

* Redesign existing processes to support omnichannel interactions (phone,

email, chat, social media).

* Implement skills-based routing, directing customer queries to the most

appropriate agents based on skill sets.

* Standardise service levels across all customer touchpoints to ensure

consistent service.

* Standardised Processes for handling both general customer service and

repair requests.

* Deﬁne workﬂows for handling different types of customer interactions.
* Standardise escalation paths and issue resolution routes.
* Establish subject service experts to deal with more complex customer

requests

Workforce and Scheduling Optimisation

Optimise staff scheduling and resource allocation based on forecasted demand.

* Utilise data to inform customer demand and deploy strategy to control demand volume
* Implement workforce management tools to dynamically schedule agents in real-time based on demand.
* Introduce ﬂexible shift patterns to allow agents to switch between general and repair queries.

Self-Service and Automation

Enhance self-service options to empower customers and reduce manual intervention.

* Introduce chatbots for simple tasks such as making payment or
* checking account balances.
* Further develop the Customer App offering 24/7 self-service.
* Automate post-interaction follow-ups to increase customer engagement and satisfaction

1. **Data**

Key Focus Areas

* Data Integrity and Centralisation: The uniﬁed CRM system should act as the single source of truth for all customer data, ensuring that customer history is available to all agents across the organisation.
* Data Analytics for Optimisation: Use real-time data insights to predict demand, optimise staffing and track operational bottlenecks. Predicting demand based on customer behaviour will be essential in the future system design
* Feedback Mechanisms: Regularly capture customer feedback to inform ongoing service improvements.

Integration, Reporting and Analytics

**CRM Integration**

Centralise customer data into a single CRM platform to provide a 360° view of each customer.

* Conduct data migration from legacy systems to the new CRM.
* Ensure real-time syncing between the CRM and omnichannel systems (voice,

email, chat, social media).

* Create a uniﬁed data model across all communication channels to ensure

consistency.

**Analytics and Reporting**

Provide real-time insights into service performance, customer satisfaction and operational bottlenecks.

* Implement dashboards for tracking KPIs such as First Contact Resolution (FCR), Average Handling Time (AHT) and Customer Satisfaction (CSAT).
* Use predictive analytics to forecast common repair needs and customer behaviour.

**Data Integrity and Security**

Ensure that customer data is handled securely and in compliance with regulations such as GDPR.

* Conduct data security audits pre- and post-implementation.
* Implement security protocols to prevent data breaches during migration.

1. **Technology**

Key Focus Areas

* System Integration: Ensure that all key systems—CRM, CCaaS, IVR and telephony— are integrated to provide seamless customer service across all channels.
* Omnichannel Capabilities: Implement an omnichannel approach where customer interactions via phone, email, live chat, or social media are centrally managed in the CRM.
* Automation and AI: Introduce automation to handle routine enquiries, allowing agents to focus on more complex customer interactions.

System Implementation and Integration

**CRM Deployment**

* Implement a CRM platform that supports both general and repair enquiries.
* Select a CRM platform (e.g., Salesforce, Microsoft Dynamics) with omnichannel capabilities and a CCaaS system to support the uniﬁed contact centre.
* Develop APIs to integrate the CRM with the CCaaS and telephony systems.
* Integrate the CRM with existing systems like the QL Housing Management System, DRS and Versa,

**CCaaS and Skills-Based Routing**

Implement a cloud-based CCaaS platform to streamline customer interactions and improve routing efficiency.

* Choose a CCaaS provider (e.g., Five9, Genesys) that integrates with the CRM
* Deploy skills-based routing to prioritise and direct customer enquiries based on agent expertise
* Ensure omnichannel support (phone, email, chat) with seamless handover between channels
* Ensure scalability and adaptability to support future growth

**IVR Replacement**

Replace the IVR system to enhance customer self-service and streamline routing.

* Implement a modern, AI-driven IVR system that integrates with CRM and routes customer calls based on issue complexity.
* Simplify IVR menus to ensure customers reach their desired destination quickly.
* Conﬁgure IVR to allow self-service for routine tasks (e.g. Payment or account balance information)
* Monitor real-time data from the IVR to continuously improve call handling efficiency.

**System Optimisation & Resilience**

* Implement a robust system backup and disaster recovery plan to ensure business continuity

Staffing Model Design

Moving to a unified customer hub will involve reviewing the current staffing structure and developing a ﬂexible staffing model that incorporates skills-based routing, cross-trained agents and dedicated team experts for complex cases.

A structured cross-training programme for agents will be required to enable them to handle both general services and repairs-related queries.