

Creating more customer-facing time

Issue

Staff in most branches regularly struggle to find the time to provide customers with the attention they need. Opportunities to sell further products or provide the high levels of service which customers expect (and most staff want to provide) are thus lost. Setanta analysis shows that up to half the time available to staff can be taken up in administrative tasks.

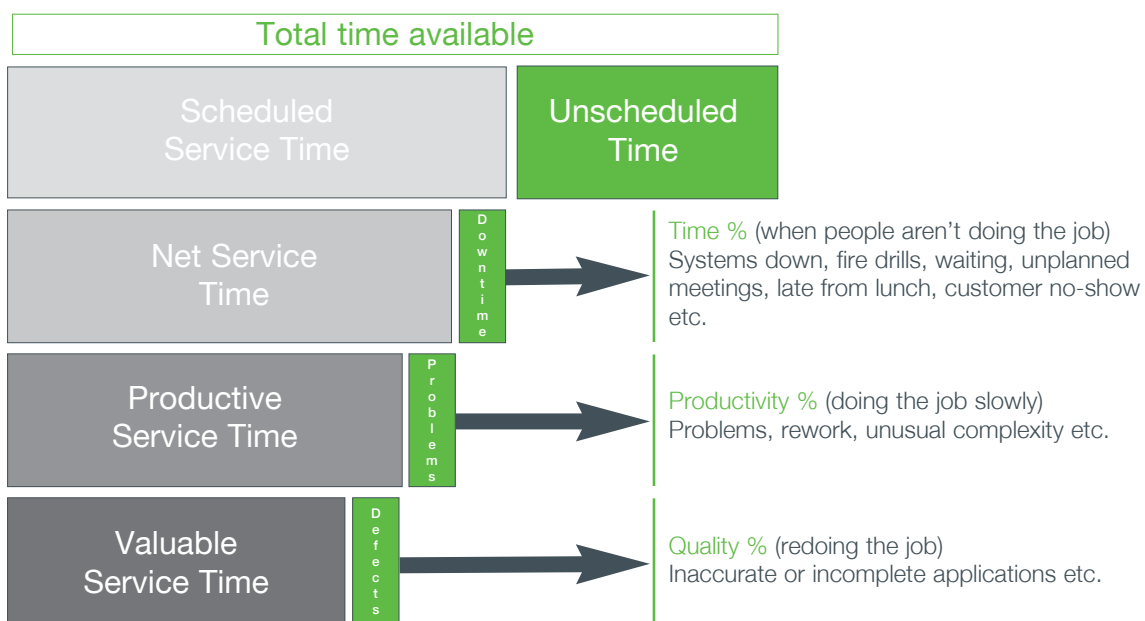
New technology and centralisation of many processes can help but they are not the whole answer. Branch based sales and service processes may need to be re-engineered. And staff and managers need help to see how they can use available time more effectively.

Solution

Setanta's SalesChain BlitzSM methodology helps branch personnel, in conjunction with their back shop colleagues, to analyse and redirect unproductive time to customer-facing sales or service tasks. This is achieved without increasing the number of people involved - indeed it usually frees up significant resources. It also helps them to make more effective use of the time liberated from administration.

How it works

Setanta consultants work in a collaborative, hands-on fashion with your branch people to find and eliminate situations where time is wasted or used unproductively. As the diagram shows, they are seeking to find and minimise all the points at which time is used ineffectively.



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The approach has seven steps

- 1) identifying a sponsor who has responsibility for all or a number of branches and agree a small number branches which are representative of the network or region
- 2) organising all managers and staff to track the use of their time for one week
- 3) nominating staff from each branch to attend a half meeting to review the data gathered. They identify the obstacles, key time wasters and prioritise the areas for improvement.
- 4) developing a detailed plan with a clear scope, goals, timescales and roles for developing and piloting improvements
- 5) project team works up to four days to develop new approaches, try them out and gather test data
- 6) once new methods have been confirmed, participating branches implement the new methods for up to a month
- 7) final meeting of the sponsor and members of the senior management team to review the report and results from the team. After in-depth probing and challenging, senior management give approval to roll out the successful new approach across the region or network.

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How it is different

SalesChain BlitzSM is different from traditional methods because it:

- involves senior management in tracking improvement - and in driving rollout to the whole network within a few weeks
- is accomplished quickly - pilot branches are running at improved rates within three weeks of the start
- employs your own process owners - as they identify and design in improvements
- uses existing operating systems - yet causes measured improvements of over 50 percent of the total identified waste or *muda* - every moment when nothing of value is happening in the process
- builds on technology transfer - your own teams learn to master process excellence



Results

SalesChain BlitzSM is one element of a systematic approach to improving productivity in financial services organisations. Experience shows that non value-added time can cost profitable financial services organisations between 35 and 50 percent of their total operating cost.

SalesChain BlitzSM has helped to remove at least 50 percent of identified *muda* from selected processes. In one client organisation the equivalent of nearly two full time posts were released from administrative roles into sales activities across the whole branch network.



Joe Liddane has over 20 years of consulting experience within the financial services sector. His reputation within the market and his knowledge of industry issues have allowed him to build long-term relationships with key industry figures.



Jim Van Patten is a senior associate and consultant who has helped a wide range of major organisations to implement new ways of improving processes.

For more information

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