

# The Little Red Book



New IT won't deliver value without new working habits. Training alone doesn't work. Our customer-centred, tailored, holistic approach does.

## Issue

IT is quoted as the single largest area of internal investment by most of our clients. Research shows that 80% of all technology projects are not used in the way intended. Indeed there are many projects that simply perform indifferently, making nothing like the forecast return on investment.

After years of practice some things have improved but getting staff on the front line to adapt quickly and confidently still remains cumbersome and costly. Three common execution strategies have evolved, each with their own drawbacks:

1. **Software vendor solution:** this generic training is about pushing buttons and which screen to use, not about delivering a high quality customer experience
2. **Video or online learning:** can be better, especially when customised, but the focus is still primarily on the system, leaving staff to figure out how to integrate the new screens and flows into conversations with live customers
3. **Classroom:** however good the training, hauling everyone into the classroom has obvious drawbacks - time and money.

Implementing new technology should be about changing the way that people work so that they can interact with customers as if nothing has changed the minute you go live. The future requires a change in gear and a new way of thinking.

## Solution

Through research and experience Setanta has developed a customer centred implementation methodology that:

- puts the customer first, so technology is applied in a realistic context
- achieves staff speed to proficiency quickly, consistently and at low cost
- equips managers to lead the change and embed new behaviours from the outset
- responds quickly to the limitations of new IT implementations thus delivering accuracy in shorter time frames

We use on-site, team coached self learning to build confidence and competence which is where our little red book comes in.

## How it works

**Step 1: Alignment.** Based on your most common customer scenarios, we define a detailed customer experience model. To this we 'align' each screen and key-stroke, thus defining the optimal route through the system, from the customers' point of view.

**Step 2: Scripting.** Using your paper based or on-line management system, we create user friendly 'scripts' that detail each step in the customer interaction, the screen or key stroke needed and the model sales or service dialogue. This provides a realistic and integrated picture of what 'good' now looks and sounds like, from a staff point of view

**Step 3: The Little Red Book.** Based on a proven drill and practice methodology we create a learning framework that rehearses each of the customer scenarios, in context, integrating system, interaction and dialogue all at the same time.

**Step 4: Implementation.** Working together with your people, we build an implementation plan that gets staff fired up about the new technology, overcomes resistance to taking the changes on board, specifies the support available and engages line managers by making them accountable for a successful rollout.



### How it is different

Our approach is unique because it:

- choreographs the customer interaction, process, system and dialogue all at the same time thus building staff confidence
- reinforces existing good practice but in the new context thus reinforcing compliance and reducing errors from the outset
- is based on customer behaviour that staff recognise thus reducing resistance and increasing confidence
- is a proven methodology that can be customised to your situation quickly and easily.



### Results

Through our proven worldwide experience in this type of tailored training we can help your people to

- achieve tight timescales
- pilot, implement and maintain day-to-day services
- demonstrate improvement in customer satisfaction and compliance levels
- improve the likelihood of a positive return on your IT investment.

All through developing your own version of our Little Red Book.



**Rebecca Marek** has over 20 years of consulting experience within the financial services sector. She specialises in mission critical situations where the stakes are high and significant change is needed quickly.



**Alison Read** has worked in financial services and retailing for over 15 years. She specialises in helping clients implement their strategy, whether they deal with customers face to face, remotely or virtually.

### For more information

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