Phoenix Heritage, Customer Division

🔧	**Industry:**	Financial Services
🔗	**Business Area:**	Customer Division, Operational Oversight and Product Review
⚙️	**Project Type:**	Back Office, Operational Oversight/Compliance
📅	**Duration:**	Nov 2023 – Apr 2024
📍	**Location:**	Wythall, Edinburgh, Telford

Featured Results

> "We certainly got everything that we'd hoped for from the project with Managementors. Particularly on the Product side, the teams worked really well together, the engagement was great and there were always lots of interesting conversations going on. As a team, they felt that the project was very much theirs and they were in the lead."

Gillian Bellshaw
Head of Customer Transformation and Change

15%
performance improvement in Product Review, with management confident they can continue to further improve performance

49%
improvement in Complaints Oversight achieved during the project, with continuous improvement embedded, resulting in an average improvement of

172%
from baseline 3-months post project close

36%
improvement in Outcomes Testing achieved during the project, with new ways of working embedded

> "I've never worked at a company that has allowed people of my level to be so involved in how the team will work in the future."

Chris Twyford
Manager, Product Review

The Challenge

- Processes had numerous checking and review steps throughout management levels, leading to rework and feeling of lack of ownership

- Very capable technical experts in management positions, without being given the tools and support to effectively manage the performance of their teams

- Limited performance data existed within the teams to give visibility of work or individual output

- Little science was used to determine headcount requirements, and a lack of detailed understanding of each function meant there was limited ability to challenge requests for increasing resource levels

- Inefficient interfaces between teams led to frustration, delays and ineffective working practices

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Our Solution

Our solution had four focuses:

People — Working with people to update ways of working and support managers to drive improved team performance

Process — Identifying bottlenecks in processes and interfaces and then minimising their impact

MOS — Implementing an effective Management Operating System

Issues — Ensuring issues were captured and resolved at root cause

Introducing activity trackers and bespoke performance reporting to capture data and provide performance visibility, enabling active management

Installing a systematic process for capturing and resolving issues with clear escalation processes

Creation of supporting tools and ways of working to embed the MOS in each area

> "People had historically believed that our complex operating model couldn't be measured, but my view was that you can measure anything and we're now able to! We've got a clearer understanding of what our teams are doing and how they're performing."
>
> **Gillian Bellshaw**
> **Head of Customer Transformation and Change**

> "The change we made in the process was one of the best outcomes of the workshop we did. We are already seeing its impact – they have loads more tests available to them to work on."
>
> **Chris Whiting**
> **Outcomes Testing**

Key Benefits

- New and improvement MOS embedded, comprising of increased visibility of performance, clear, scientific resource models, and an overarching review structure ensuring appropriate accountability and escalation

- Increased productivity of teams through manager coaching, performance visibility and streamlined checking processes, increasing the capacity in teams, some of which has been released and some used to absorb more work without increasing resource levels

- Clear roles and responsibilities and standardised ways of working embedded across all three teams

- Refined checking processes to reduce duplication and enable more ownership at lower levels

- Systematic and standardised tools and processes created and embedded to raise, prioritise and resolve issues

- Updated testing and requirement processes and interfaces to enable longer lead times with Offshore Providers, reducing the bottleneck of work for analysts

Who did we work with?

- Head of Customer Transformation and Change
- Head of Finance, Resource and Change Governance
- Head of Product
- Heads of (Product Review, Outcomes Testing, Complaints Oversight)
- Senior Managers
- Managers
- Consultants and Analysts

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