



Fully optimised Workforce Management solution unlocks 30% planning efficiencies while delivering increased employee engagement



50%
fall in contacts into
the Planning team

thanks to optimised WFM
Self-Service capabilities



69%
NPS score
Award Winning
customer service



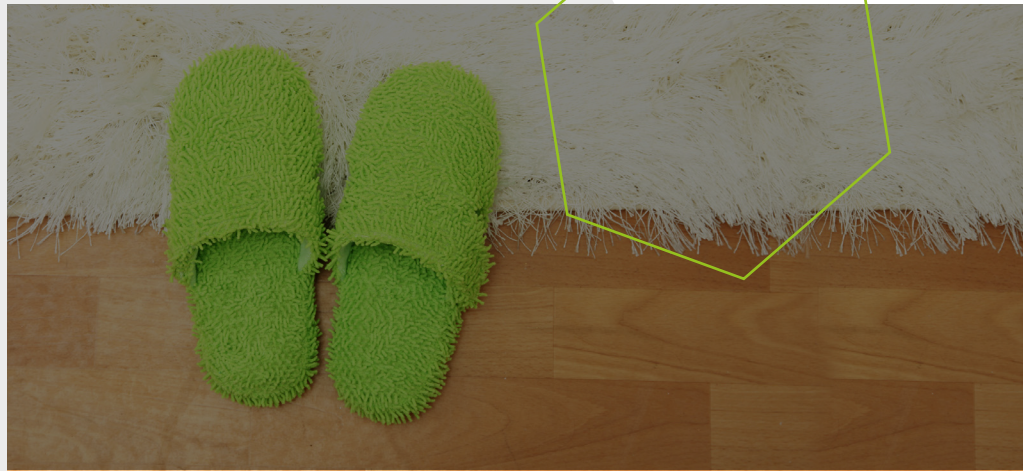
82%
Employee
engagement

With over 5.5 million customers, LV=General Insurance (LV= GI) is a leading general insurance provider in the UK – well known for its car insurance but also offering a range of other insurance products including home, pet, travel and landlord.

LV= GI was recently named as the Best Insurance Provider at the annual Which? Awards, and is ranked in the top 10 of the Institute of Customer Service UK Customer Satisfaction Index. LV= GI believes in putting the customer at the heart of what it does, and its ambition now is to be 'Britain's Best Loved' provider.

"Our people work relentlessly hard at LV= to provide an exceptional service for our customers, and we're proud to have increased our NPS score by 5% to 69%. However, we need to keep improving if we're to keep meeting our customers' evolving needs." – Phil Coole, Senior Operational Planning Manager, LV=GI

To help achieve this, LV= GI identified the need to optimise the performance of its Workforce Management solution to help the business better serve its customers, support its agents' lifestyle demands and manage customer service costs more effectively.



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With Sabio we know we can go beyond the confines of the WFM tool. They understand what we're trying to do, and they've got the skills and experience to make it happen.

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Phil Coole, Senior Operational Planning Manager, LV=GI

The Opportunity

Although a Workforce Management (WFM) user since 2011, the LV= GI Operational Planning team was keen to take its deployment to the next level. They knew that effective WFM would be a key enabler in continuing to provide award-winning service to its 5 million plus customers and was determined to leverage the latest best practice WFM thinking from its solution.

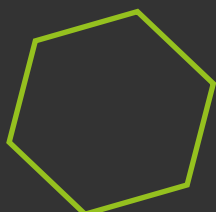
The Solution

LV= GI worked with its specialist customer engagement technology partner Sabio to enable its WFM software to underpin its operations strategy. In addition to optimising planning resources, the company also ensured the necessary flexibility to support its agents' lifestyle demands while also supporting more strategic planning.

The Results

Placing WFM at the heart of its planning strategy has helped LV= GI to:

- Supported an NPS score increase of 5% to 69 points
- Supported delivery of 82% engage scores – with Planning scores of 88%
- Reduce contacts into the planning team by 50%
- Improve Planning team productivity, supporting broader LV= GI portfolio with 30% less planning resource



Evolving the role of Planning @ LV= GI

The LV= GI vision is to be Britain's Best Loved, so providing award-winning service to its five million plus customers is critical to achieving the company goal. Delivering on this involves a team of around 3,000 people across seven UK sites supported by around 300 homeworkers.

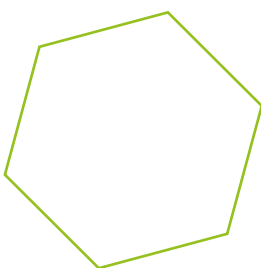
Effective planning is clearly a vital part of the LV= GI customer service, with 23 people in Planning, three budget & recruitment analysts, nine people across two separate Workforce Management (WFM) Planning teams and a further six people focused on Service Delivery.

While the LV= GI Planning team has been recognised with multiple industry awards, it was determined to evolve its role to support operational colleagues in becoming 'best loved' by enabling award-winning operational flexibility and empowerment.

"At LV= GI we have an Ops Planning vision of access to real-time, multi-channel demand MI where skilled planners are able to use a combination of existing tools, new technology and predictive analytics to truly understand, better plan for and improve our customer journeys," explained Phil Coole.



Maximising WFM performance enables a **30% efficiency improvement** across Planning



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While continuing to remove waste from our processes and re-investing our time on improving our analytical capabilities is essential, we're equally focused on providing great lifestyle opportunities for our team. That's why WFM is at the heart of our strategy, and why our partnership with Sabio is so important.

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Phil Coole, Senior Operational Planning Manager, LV=GI

WFM core to the LV= GI Planning process

WFM is absolutely core to the LV= GI Planning function, with most of its processes driven directly from it at source or built around it. The company is a long-term WFM software user, having replaced its original tool in 2011 with the Avaya offering.

Two separate WFM Planning teams – one focused on Sales & Service and one on Claims – use the WFM software to produce eight weeks worth of plans at a 15-minute interval level for 12 key business areas. Over the last few years LV= GI has worked closely with customer engagement specialist Sabio to ensure that it has a continuous development strategy around its usage of WFM.

"We want to ensure that we're leveraging the very best from our Workforce Management technology, so we challenge Sabio to make sure we're getting the most from our WFM investment" - Phil Coole.

Over the last two years, LV= GI has worked hard to improve the critical management information that feeds its planning process. A combination of WFM and core telephony platform data has helped to automate much of its reporting, helping to remove manual errors and create one version of the truth. Maximising WFM performance, coupled with general process improvements and automation has also enabled a 30% efficiency improvement across the Planning process.

Creating a better work/life balance for LV= GI staff

While recognising the importance of optimising resources across customer service, the LV= GI Planning team is also determined to make the most of its WFM tool's ability to empower agents. Around 10% of LV= GI agents are homeworkers, and the Planning team also wanted to make full use of its WFM solution's self-service capabilities.

"We originally implemented features such as automated holiday booking and shift swap functionality when we first deployed WFM in 2011, but we soon realised that making full use of these capabilities required fine-tuning," explained Phil Coole. "However, with over 10% of the email traffic into the Planning team focused on holiday booking concerns and shift swap complexities, we clearly had work to do!"

To address this, the Planning team reviewed the rules for shift swapping, removing potential barriers and making much better use of the shift swap boards. Agents are also now able to book overtime through the use of net staffing

Team Leaders often used to spend too much time behind their desks – **now some of them don't even have desks!**

Breaking down the silos

LV= GI has also worked hard to redesign its budget models, simplifying them, automating data input and also incorporating 'what if?' models to enable the team to flex assumptions.

"We've really focused on breaking down the silos between our budget & recruitment, WFM Planning, service delivery and reporting functions so that we're now all part of a single, joined-up planning team," explained Phil. "Key to this was ensuring a move away from the kind of 'us' and 'them' environment that often exists between Planning and Operations teams – now it's all about building bridges and helping our Ops people to make great decisions based on accurate, consistent data, which is supported by our expertise."

Our aim is for Planning never to have to say no to Operations

Optimising WFM performance and empowering frontline staff has helped LV= GI to improve its overall planning performance, with key innovations including:

- **An easy-to-use Planning Portal**
- **Simplified reports based on WFM and Telephony data**
- **'What If?' modelling tools to empower managers on impact of change initiatives**

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Moving beyond standard WFM with Sabio

The LV= GI Planning team works with the company's specialist customer engagement technology partner Sabio to help take its Workforce Management activities to the next level. With WFM right at the heart of the planning strategy, this is a critical partnership and one that requires a deep understanding of both WFM technology and how it integrates with other key solutions, as well as the broader LV= GI culture.

"Working with Sabio we benefit from access to senior Workforce Optimisation consultants with in-depth Verint and Avaya expertise who help us to develop and refine our WFM planning capabilities," explained Phil. "Perhaps more importantly, the Sabio team really understand the LV= GI culture and what we're trying to achieve, so we benefit from a much more collaborative approach as we continue our WFM journey."

An example here was how Sabio's WFM specialists worked with the LV= GI team to create a process within WFM that automatically tracks when people are working late. Now in the process of being successfully deployed and part of the LV= GI Planning process, it's an activity that previously took up a week of someone's time each month – that's the Sabio difference.

In addition to providing an ongoing WFM audit and consultancy to ensure the LV= GI deployment stays on track, Sabio is also active in sharing industry best practice contacts and opportunities with LV= GI, exposing the Planning team to different approaches from both a technology and people perspective.

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Sabio takes us way beyond the standard, out-of-the-box WFM offering, helping us to achieve the functionality we need.

Phil Coole, LV=GI

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