

UKTI – Katalyst Communications

Outbound Calling Programme Case Study

UK Trade & Investment is the government organisation that helps UK-based companies succeed in the global economy. They have staff around the UK and in Embassies and trade delegations around the world. They offer advice to businesses and deliver services including seminars, conferences and tradeshow participation in many countries in order to stimulate exports and inward investment. An Enquiry Service, based in Glasgow, provides telephone and email contact to many of these customers.

2009 figures show that UKTI provided services to over 20,000 businesses. They wished to make fuller use the Enquiry Service staff expertise and contribute to a probable target of 30,000 by FY 2011. They commissioned a new outreach programme so the Service could offer advice pro-actively to more businesses wishing to export or attract inward investment. This was required without recruitment or increasing headcount.

In March 2010 Katalyst Communications successfully tendered for the development programme. The team was mobilised within two weeks and a plan developed in line with UKTI's needs. The required workstreams included:

- Staff and Manager training
- Campaign development and management
- Business planning and rostering
- An e-channel review
- Project management of the changes

The Enquiry Service was well versed in responding to customer requests, but the outbound work required new skills, processes, rosters, reporting and performance management. Katalyst were selected to develop the business in each of these areas over a 4 month period. With its wide field of expertise, Katalyst put in place a plan of people development, skills evaluation, management process development and reviews that were to successfully introduce the new service.

There was significant uncertainty in the team about the outbound calling work. Inbound and outbound work do require different skills and different management approaches. Few in the team had previously undertaken outbound calling and the programme was initiated against the backdrop of a change of government and looming financial pressures. Katalyst and UKTI adopted an open approach to communication so that staff understood why the changes were needed and had an opportunity to talk openly with the Katalyst team about their hopes and fears of the new outbound work.

The programme started with a training needs analysis which incorporated one-to-one interviews and online psychometric profiles (Katalyst chose a system that predicts performance rather than measures skill). The staff found the feedback from these particularly valuable as it addressed topics such as confidence, skills, attitudes to change, culture and team work.

Team and individual development sessions were held over a three month period with workshop sessions adapted to the needs and learning styles of the audience. One Enquiry Officer commented "every team member was able to gain positive results from the training".

Campaign development and rostering changes followed. The UKTI team identified the initial campaigns to follow up new Tradeshow Access Programme participants and Katalyst worked with them to develop effective calling scripts, estimate calling times and success rates and compare these to standard metrics.

In order to put the campaigns into action, new rosters were needed that improved productivity whilst allowing the agents to get into the rhythm of handling both inbound and outbound calls. Analysis of the customer calling profiles, opening hours and shift patterns demonstrated that this was possible with cooperation between senior managers, supervisors and front line agents. This was achieved by a combination of desk work, training and joint working.

The team put their training to use and quickly reached industry levels of referral rates. The focus then moved to increasing productivity as the team settled in to their new blended role. The new rosters enabled the outbound calling to proceed even when the team suffered attrition later in the year.

The e-channel review looked primarily at the email and web traffic between UKTI, partners, customers and other public sector bodies offering related services to the same audience. This included a review of the messages, targeting, branding, ease of access, web site strategy, search engine performance, partner working and B2B social networking sites. A series of recommendations were made to focus the messages, clarify regional vs. national initiatives, reduce overlap between partner organisations and make it easier for businesses to get access to the services they need.

New management information reports were generated to reflect the outbound activity. These focused on the important facets of the campaigns and were a starting point for continual improvement of skills, rosters, campaign scripts and processes.

Katalyst also provided advice as to the layout of the office environment and data cleansing. After go live, a period of on-the-job agent coaching helped to build confidence and productivity further. Managers and staff not only welcomed the opportunity to develop new skills but they also worked better as a team and had wider contact centre experience to take forward in their career. UKTI commented that the Katalyst team were “seriously impressive”, “highly flexible” and that the programme was delivered “extremely successfully; in fact, beyond expectations”.

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Approved by Ron Archibald, Director, UKTI Enquiry Service.
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