CASE STUDY

SLAKING THE THIRST FOR CUSTOMER SATISFACTION

Abstract

When lingering customer dissatisfaction plagued the performance of her function, Imelda Santos, Director of Customer Experience at a leading US investment management firm decided it was time for transformation. She brought in a team of specialists from Infosys BPM who reversed the tide of poor agent performance through their expert application of lean methodologies. This case details their transformative approach as well as the significant outcomes: an all-round improvement in customer satisfaction metrics and great reduction in the dissatisfaction drivers.

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When customer angst runs high

Imelda Santos is the Director of Customer Experience & Service Operations, at a leading investment management firm in the US that offers a wide range of investment products, advisory services, and retirement solutions. She is responsible for the performance of end-to-end customer experience across multiple contact centres run by the organization and its external service providers.

Of late, Imelda had been reading her customer satisfaction (CSAT) survey reports with a deep sense of foreboding. The CSAT metrics were at a very low ~74.2%. Customers had also expressed significant dissatisfaction (DSAT) over their agent interactions as well as with the issue resolution processes. Yet, Imelda knew that a high proportion of the customer concerns were preventable - the gaps were in execution discipline rather than process design.

In the past, Imelda had tried several approaches to improve the performance of her agents. She had provided them with standard training refreshers and ad-hoc coaching but saw only temporary improvements. However, with limited visibility into which issue resolution defects were truly controllable and which were structural, there was little else she could do. To really change things, she would need in-depth visibility into which agent cohorts — for example, based on tenure bands, or bottom quartile ratings — were driving the metrics downwards, as well as visibility into which training interventions had produced measurable movements.

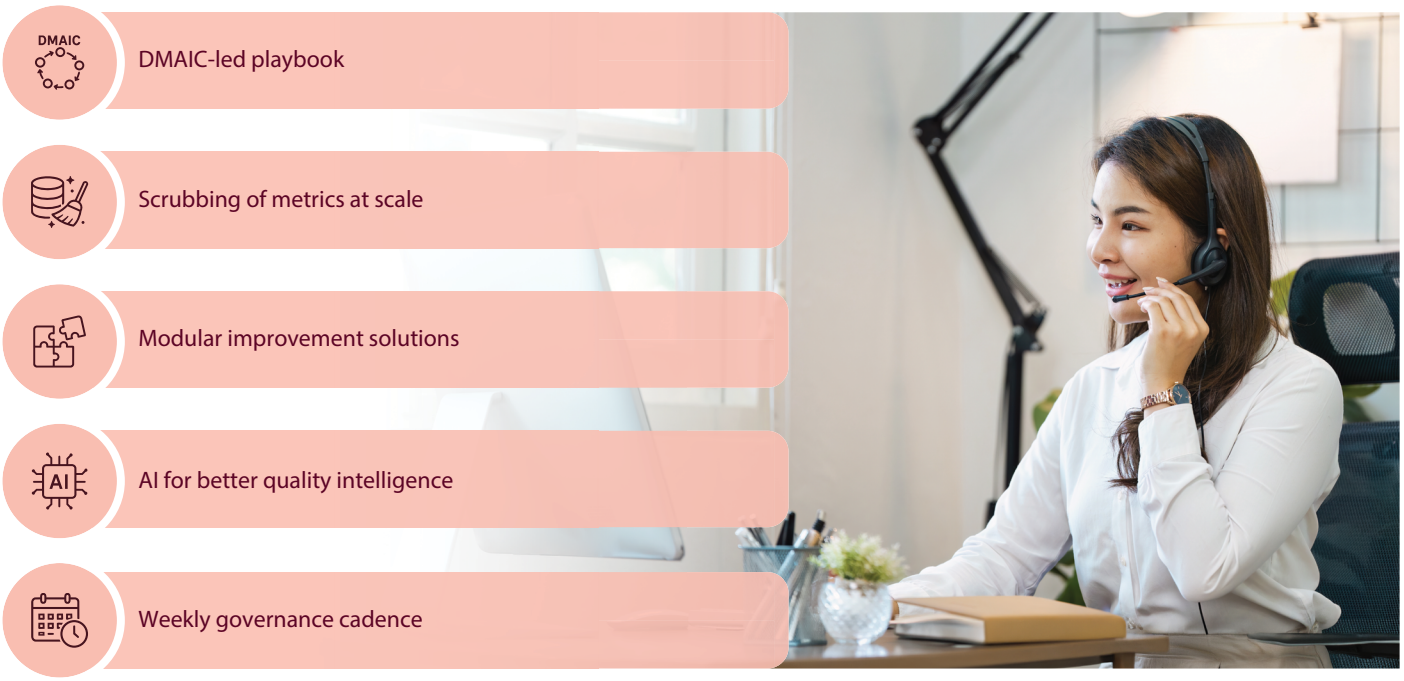
But now, as the report indicated, the pressure to change had become critically urgent as Imelda's department faced a performance credibility risk. It had repeatedly missed or shown high volatility in meeting targets for Customer Satisfaction (CSAT), first call resolution (FCR), average handle time (AHT), time spent listening (TSL) and other quality metrics. Resultingly stakeholder confidence was at an all time low. Imelda was also sensitive to the looming compliance risks with the recurring security defects in regulated interactions, increasing the potential for audit or regulatory exposure.

Realizing she needed external support to transform her customer service processes, Imelda brought in Infosys BPM's transformation expert Oliver Plassman. Oliver's team initially provided Imelda's teams with voice support for high-volume customer inquiries with baseline quality monitoring and standard operational reporting. However, the partnership soon evolved, expanding into an integrated model to include quality framework strengthening, training transformation and assessments, performance analytics, targeted interventions, and digital enablement for decision support and coaching workflow automation.

The five phases of transformation

Oliver began transforming Imelda's customer service processes through a portfolio of connected interventions executed in a measurable manner. For this, he used a DMAIC-led playbook, with its five phases of Define, Measure, Analyse, Improve, and Control.

Approach Summary



In the Define phase, Oliver's team clarified the various target metrics — CSAT, FCR, AHT, TSL, and quality tolerance — and their thresholds. They also identified concentrations of performance volatility; for instance, in bottom quartile performers, agents with low tenure, or in specialized call types.

Then, in the Measure phase, Oliver and his team focused on building baseline signals of the defined metrics using weekly tracking, segmentation by tenure bands and performance quartiles. They also performed scrubbing of the DSAT metrics at scale, conducted pre- and post- training assessments to gather pass rates, and made comparisons with target and control groups.

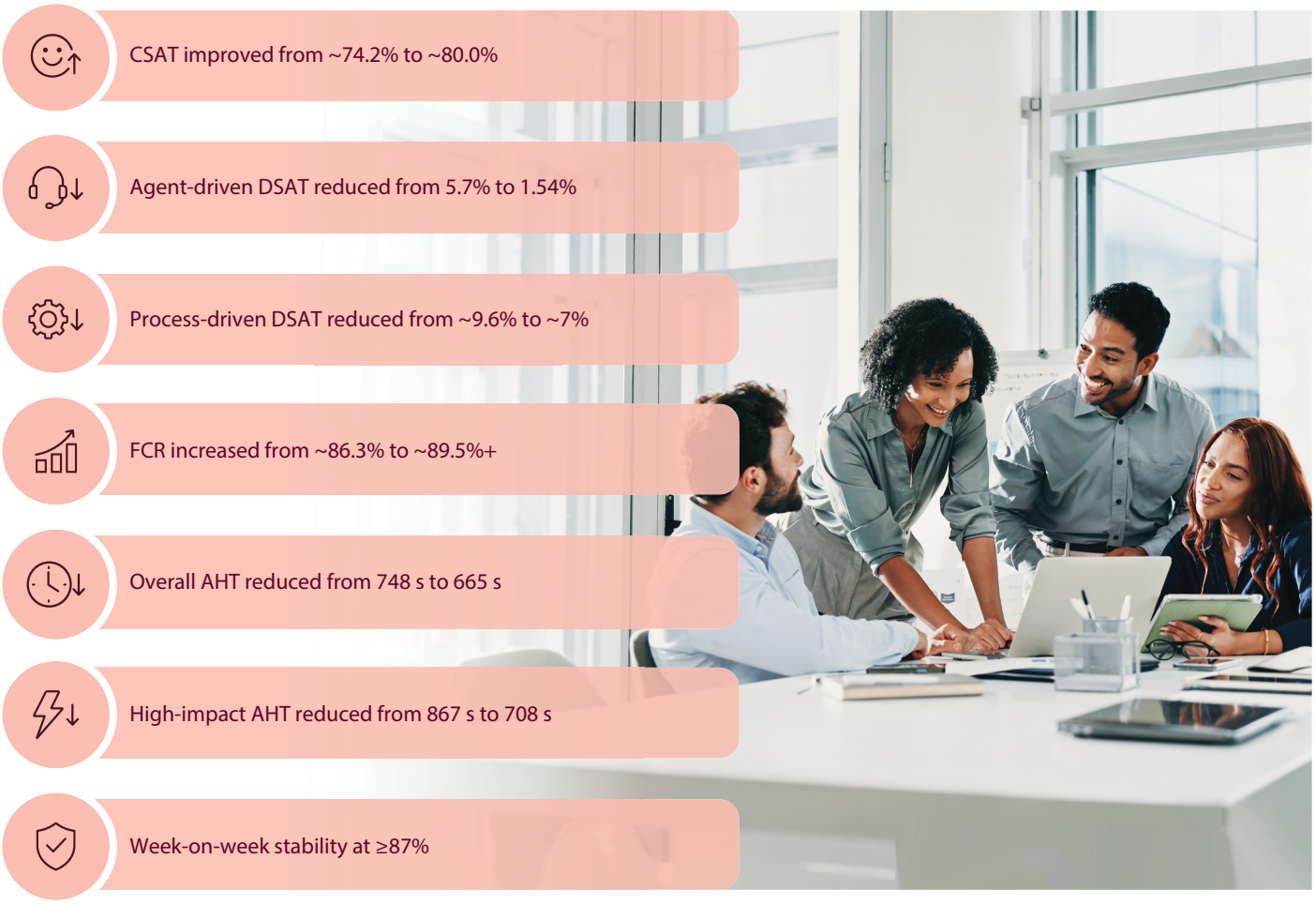
In the Analyse phase, the team moved to conduct causal diagnosis, first across agent behaviour gaps such as in call flows, probing techniques, intent handling, and power closing statements. Then they diagnosed the process defects in areas such as expectations setting, and regulatory alignment. Lastly, they analysed the external dependency drivers affecting customer issue resolution, as well as the security defect drivers and controllable misses of standard operating protocols (SOP).

For the Improve phase of the transformation, Oliver directed his team to develop modular improvement solutions, each tied to a measurable outcome in areas such as CSAT, FCR, AHT, quality, security, and sustainability. To accomplish this, they designed and delivered numerous workshops, structured and refresher trainings, role plays, huddle drills, and call listening labs focused on standard operating procedures, probing techniques, and authentication protocols. Then, to reinforce all the newly learned behaviours, they instituted a higher audit frequency for targeted cohorts, as well as gamification and recognition schemes. For better quality intelligence, they leveraged AI tools to minimize the earlier dependency on manual QA, which improved root cause and trend analysis of recurring compliance failures.

And then, to standardize compliance-critical call flows, they implemented decision planning tree support.

Finally, for the transformation of process controls, Oliver instituted a weekly internal governance cadence between the organization's operations, training, and quality teams, with weekly client status updates and tollgates. He also embedded monitoring and audit loops of key performance indicators (KPI) to prevent regression and continued tracking the performance of focus groups vs the control group.

Key benefits



However, throughout the change, Oliver kept dissipating these worries by using control vs focus groups to demonstrate impact, conducting pre- and post- assessments, regularizing weekly governance discussions, and clearly presenting pre- and post- metric report to show causal links and sustainability.

Eventually then, the impact of the transformation could not be denied. Imelda, as well as the other stakeholders, could not be happier with the greatly improved customer trust, reduced negative customer experiences, and stronger brand perception. These benefits were tangible and multi-metric. For instance, customer experience was completely transformed with CSAT improved from its ~74.2% baseline to ~80.0%, exceeding the target by ~400 bps. There was also significant reduction in dissatisfaction (DSAT) metrics; agent-driven DSAT plunged from 5.7% to a low 1.54% and process-driven DSAT dropped from ~9.6% to ~7%. Overall, the customer issue resolution processes shifted from volatile performance to stable, predictable CSAT delivery, especially across the bottom quartile agents and early-tenure cohorts.

The project also improved the issue resolution excellence. The FCR metric rose from its ~86.3% baseline to ~89.5%+, and its week-on-week stability at ≥87% demonstrated that it was a sustained performance, not just a one-time spike. Further, the focus group delivering +125 bps improvement, validated not only the targeted interventions' effectiveness but also reduced repeat calls by customers, thereby reducing the cost to serve. Imelda was further delighted with the significantly improved customer effort scores (CES) and resolution confidence.

Her function's productivity and efficiency improved greatly as well. The overall AHT reduced from 748 sec to 665 sec and in the high-impact segment handled by the target group it greatly improved from 867 sec to just 708 sec, a difference of over a minute. Further, these significant gains did not lead to any loss in call handling quality. Thus, the function gained great structural efficiency while maintaining compliance and quality controls. This not only increased agent productivity and throughput capacity, it also enabled volume absorption without the need for a proportional increase in headcount.

Apart from the metrics, the transformation strengthened collaboration across the organization's operations, quality, and training functions, and embedded disciplined governance mechanisms, clear success metrics, and control frameworks to ensure sustained performance.

It also enhanced both frontline and support capabilities, driving continuous improvement in skills, behaviours, and decision-making across the value chain. No wonder, these measurable improvements across customer experience, operational efficiency, and quality, significantly elevated Imelda's impact, visibility, and leadership positioning within the organization. And today, Oliver and his team continue serving the organization as the partnership matures through a strong pipeline of further improvement projects.

**Names have been altered to preserve the identities of the people involved.*

For more information, contact infosysbpm@infosys.com

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