



CREATING CUSTOMER FOCUSED ROLES AND RESPONSIBILITIES FOR A DIGITAL WORLD

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Foreword

The business process management industry has matured its service offerings in the last two decades, moving away from pure play labor arbitrage to automation, transformation, and owning end customer outcomes for clients.

The advent of advanced technologies has compelled business models to deliver and execute continuous improvement initiatives. Organizations are in a state of flux due to a multi-generational workforce that is struggling to bridge skill gaps across functions.

There is a need to reform the traditional one-size-fits-all training approach, replacing it with customized development initiatives. Pertinent skills need to be developed in employees to drive career growth over the coming years.

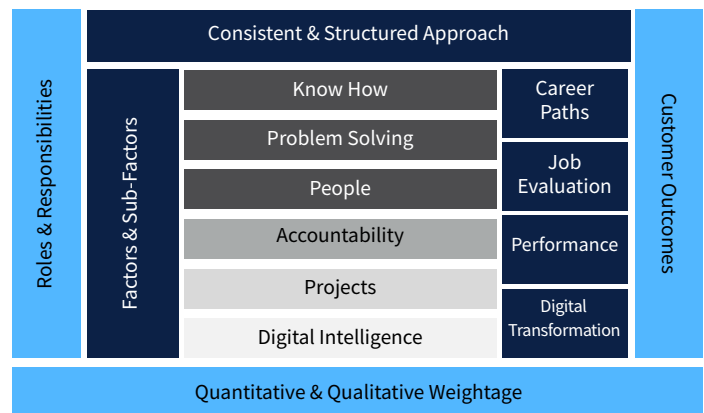
In the past, most businesses were focused on delivering products and services that addressed a small part of a customer’s needs. A change to cultural paradigm shift to embed customer centricity into the work environment is now taking place as customers become more demanding and empowered.

This is being done by aligning the business operating model with a people capability model to ensure that businesses have the right people with the right skills to effectively serve customers. Companies are moving away from opportunistic training interventions with a focus on transforming the workplace mindset to adopt a design thinking methodology.

This shifting landscape requires organizations to redefine their goals, roles and responsibilities. This change will reflect the new mindset and behavior needed to lead, manage and motivate people.

Approach

Today, organizations are focused on how innovation and experimentation impact customers, rather than just chasing metrics like efficiency and quality. Hence, leadership roles and responsibilities need to become fluid and based on the requirements of the customer. To achieve new levels of transformation and disruption, companies must align employee outcomes directly to customer outcomes to deliver strategic business objectives.



Roles must be aligned according to the value that they create.

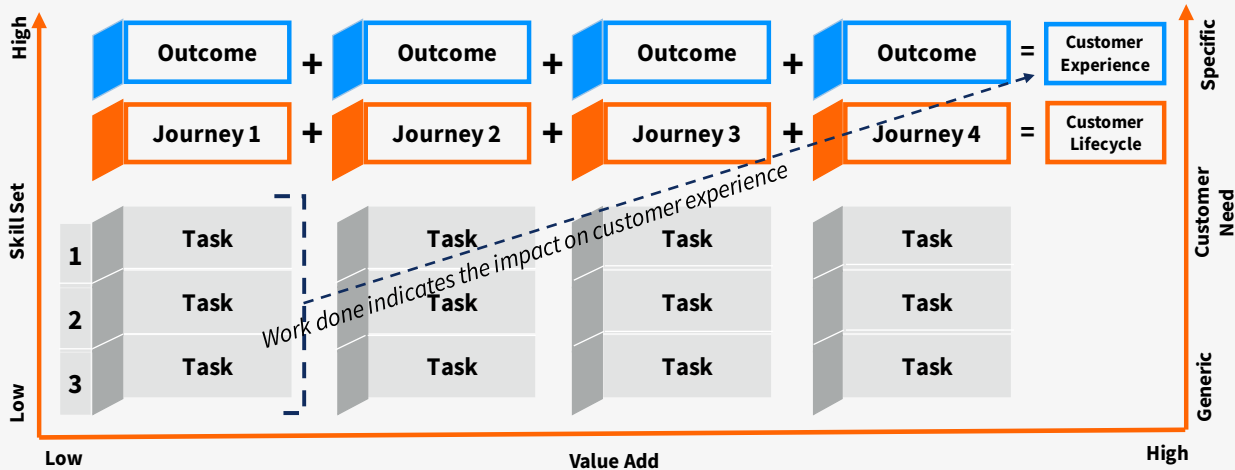
Responsibilities must focus on an achievable end state for the customer that is measurable through industry benchmarks.

This can be done through a systematic job evaluation mechanism to ascertain know-how about the job, problem solving skills for the job, and accountability for an action and its consequences. As the future becomes more digital, organizations need leaders to develop digital capabilities. Here, training and change management will play an important role in this endeavor. An organizational restructuring in roles and responsibilities, job design, mentoring, and strategic framework is needed to create the digital leaders of the future

Strategic Framework

After evaluating roles and responsibilities in the hierarchy, business should consider implementing the framework seen in Figure 1.0 which puts the customer at the heart of the business and delivers a workforce mindset change.

Figure 1.0: Focus on workforce skills that impact customer outcomes

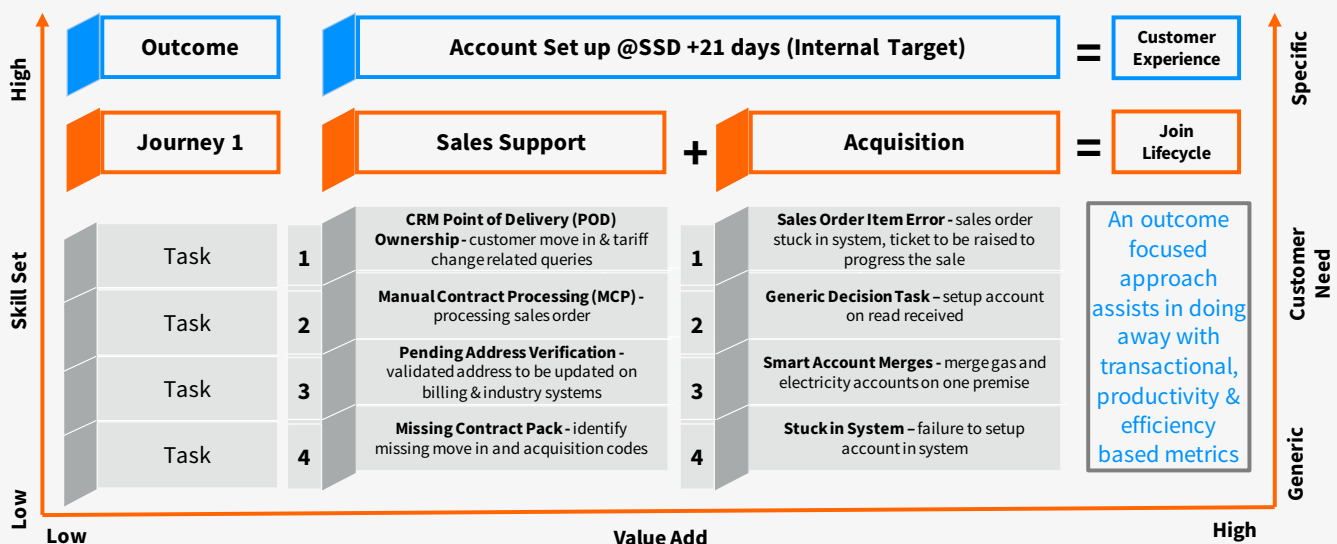


It operates by enriching and empowering the workforce to align with end customer outcomes in their respective journeys, resulting in enhanced customer experience. The individual journeys become a sum of their parts to form the customer lifecycle.

There is an increased focus on employee skill. A workforce which effectively applies digital intelligence can transform operations and is better equipped to service specific customer needs while creating more value add and maximize business performance.

Let us understand the above framework by applying this on the onboarding journey for a utility customer.

Figure 2.0: Framework applied to utilities customer onboarding



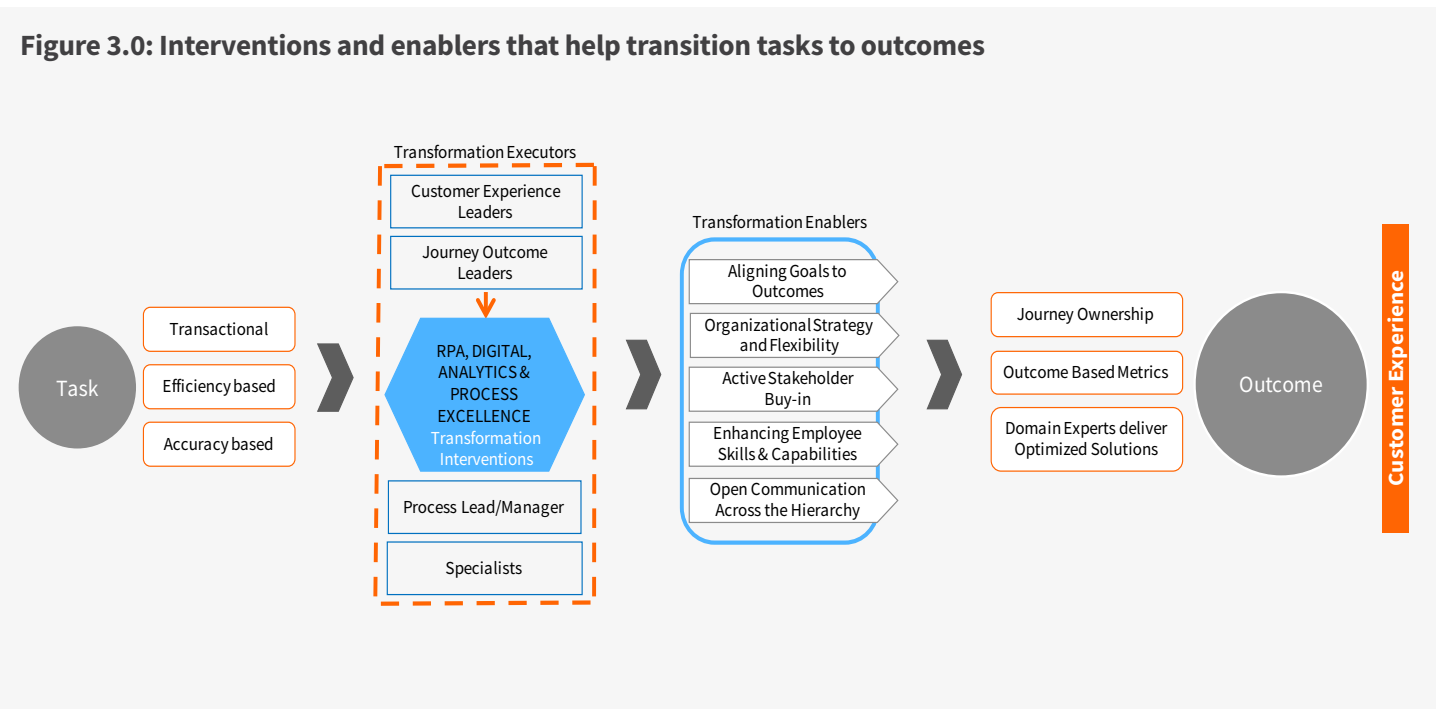
Customer acquisition is often a lengthy process involving multiple parties. There are action items occurring at various stages in the journey that need to be owned and executed to achieve the required output.

In a traditional working environment, metrics like productivity, efficiency, and quality are used to measure the fruition of a task during customer acquisition and onboarding. The emphasis is on a transactional approach that helps organizations achieve their service level agreements (SLAs). If the customer and business outcomes are not aligned, the individual SLAs can often be met while leaving the end customer’s desired outcome unmet. The roles and responsibilities framework swings the pendulum in favor of the customer with a shift in focus towards achieving desired customer outcome, such as to be on boarded faster.

In order to attain customer outcomes, an integrated approach amongst cross-functional teams is required. These changes are facilitated by using digital tools like RPA (robotics process automation) supported by analytics and process excellence to help professionals do their jobs more efficiently.

Transitioning from a transactional task based approach to a customer outcome approach involves the stages outlined in Figure 3.0.

Figure 3.0: Interventions and enablers that help transition tasks to outcomes



Start the journey with customer outcomes

Outcomes are an important way to frame conversations with clients and meet them on their terms. A key part of accomplishing this involves leveraging industry and domain expertise to analyze vast complaints and net promoter score (NPS) data. Once the fundamental outcomes are in place, they can then subsequently evolve through an effective monitoring review mechanism.

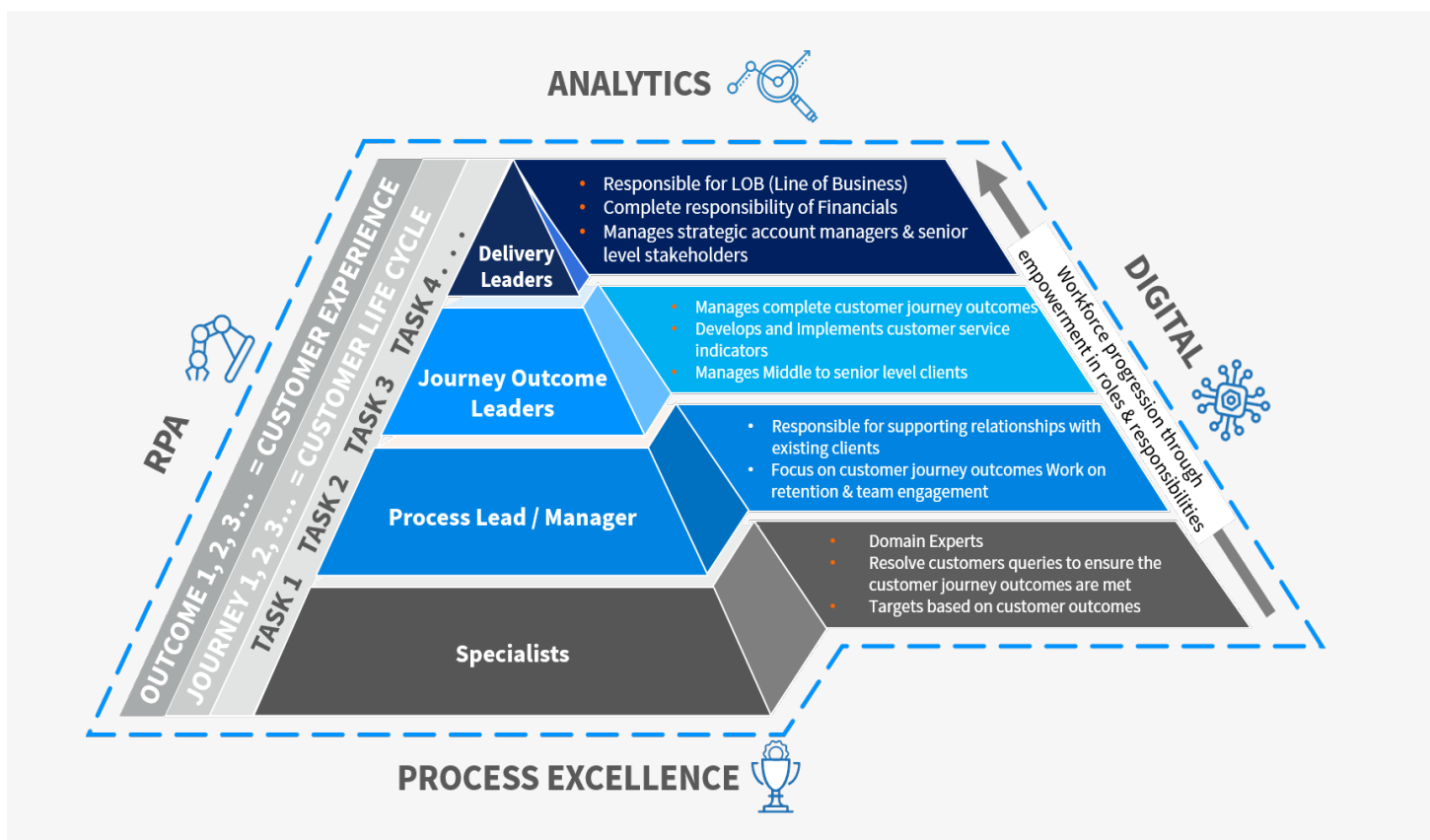
1) Connecting goals to outcome

An organization that makes it a priority to develop effective goals will succeed. Experience says that these goals need to be intricate and focus more on the end result, otherwise they tend to take a transactional execution route. Goals should

have a direct link with the customer outcomes and be as objective as possible. In order to gauge performance on delivering customer needs, only productivity and efficiency based metrics may not always be the correct measure. Targets based on completed outcome resolutions delivered to the customer should be the way forward.

2) Identifying roles

Roles need to be aligned basis a proportionate impact on outcomes. The identification of roles should be a fluid concept, not fixed. As the outcome changes, so will the classification of some of the roles. Getting back to our utilities customer acquisition and onboarding example, the existing roles will change to accommodate enhanced responsibilities. A customer service associate performing transaction processing or call handling activities that are specific to a thread-based work profile will take on the role and responsibility of a specialist who is a domain expert, the transition in role and responsibilities from a processor to a problem solver ensures customer queries are resolved and customer outcomes are met.



3) Competencies needed

It is incumbent that the competency required for the roles are described in detail. This can be done by having an understanding of what kind of value the role creates, and linking the impact of the role to outcomes and services. People, SLAs, and client management skills are important, as well as consumer-centric skills that directly impact the customer.

4) Design a clear communication strategy that reaches out to all stakeholders

Achieving outcomes takes coordination and support across all functional areas within a company. The message from the top of the org chart should not lose consistency as it cascades down through various layers of management. Communication starts with engaging the workforce in determining outcomes, then discussing the requisite roles that deliver the outcomes. The mode of communication should include but not be limited to roadshows, roleplaying, and other ways of demonstrating these new roles. This can be done by raising awareness and utilizing all channels available in the organization.

5) Start small, encompassing a phased approach

Successful change takes starting small by either focusing on a line of business or a customer journey. A phased implementation approach allows time to ensure sound plans are created for all outcomes prior to rolling up enterprise-level information.

6) Governance and feedback mechanism

It is essential that a review is done at regular intervals. This allows for mass feedback to be captured from clients and customers, and which can be circulated across the business to act upon immediately. The review should not only be limited to the statistics, but also include real time feedback from team members individually and collectively.

Conclusion

Envisioning future change in ways of working starts with designing the customer experience by empowering the front line in their roles and responsibilities to meet the un-met customer needs.

Building a customer-centric culture is arduous, but attainable. It is not a onetime result, rather it is a journey that is agile and in which one needs to embrace a

cross-functional and analytical way of functioning. At the heart of our operating model we have redefined roles and responsibilities to meet shifting market trends and changing customer expectations. Aligning capability, workforce and talent management is not a simple endeavor, it is a work in progress, and therefore needs to be continual and adaptive. By doing this, we ensure that our people are fit for a dynamic future.

EXL's client, a large utilities provider, struggled with its customer acquisition and onboarding processes. Leveraging deep domain expertise and orchestrating digital technology, EXL helped the client overcome these issues and improve this process.

- Organized analytics trainings, certifying participants in tools, methodologies, and languages
- Developed an RPA certification program for frontline leaders to gain RPA design and execution capabilities
- Coaching program to upskill the workforce on soft skills
- Process improvement initiatives for the client led to identifying operational expenditure savings of over £1.18 MN
- By applying an outcome-focused approach in the customer acquisition and onboarding process, the internal target of account setup within 21 days of the service sign-on date showed an incremental benefit of 3% in customer onboarding.

EXL (NASDAQ: EXLS) is a leading operations management and analytics company that designs and enables agile, customer-centric operating models to help businesses enhance revenue growth and profitability. Our delivery model provides market-leading business outcomes using EXL's proprietary Digital EXLerator Framework, cutting-edge analytics, digital transformation and domain expertise. At EXL, we look deeper to help companies improve global operations, enhance data-driven insights, increase customer satisfaction, and manage risk and compliance. EXL serves the insurance, healthcare, banking and financial services, utilities, travel, transportation and logistics industries. Headquartered in New York, New York, EXL has more than 31,000 professionals in locations throughout the United States, Europe, Asia (primarily India and Philippines), Latin America, Australia and South Africa.

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