



BARCLAYS

Putting Customers First with Respond

CASE STUDY

CUSTOMER DETAILS

Barclays is a UK-based financial services group, with a large international presence in Europe, the U.S., Africa, and Asia. It is engaged primarily in banking, investment banking, and investment management. In terms of market capitalisation, Barclays is one of the largest financial services companies in the world. It has been operating for more than 300 years with 48 million customers and 156,000 employees in over 50 countries.

INDUSTRY

Financial Services

APTEAN SOLUTION

Respond

CHALLENGES

- Previous system was fragmented, with 33 largely independent systems
- Customers often had to repeat the same information which led to poor customer satisfaction

BENEFITS

- User interface and operational stability of the system has improved.
- Complex complaints can now be escalated to teams of dedicated complaint.
- Customers are provided with immediate confirmation that their complaint has been recorded, as well as the name of the person investigating their complaint.

Barclays implemented Aptean's Respond to allow every staff member access to the complaints and feedback management system. In turn, this allows Barclays to improve complaint recording, respond faster, and to ensure their customers are informed about the ownership and progress of their complaint.

Barclays has woken up to the fact that its customers are important to the future development of the business. Keeping those customers loyal is the Holy Grail, and the key to doing that is making sure Barclays has the staff and the processes to keep them happy. In an organisation the size of Barclays, being obsessed with customer service is a big job. To make the job manageable, the clearing bank is abiding by three truisms: recognising that happy colleagues make happy customers, that a progressive organisation must listen to its customers, and that every complaint—regardless of its size or nature—is a serious one.

As part of a huge investment in its retail banking arm, Barclays has improved pay for its branch managers and cashiers.

"We've revamped the role profiles for customer-facing staff and listened to their feedback on what gets in the way of delivering great customer service," said the Group Customer Service Director. "We abandoned product-based sales targets, which staff felt limited their ability to provide customers with what they really wanted, in favour of a measurement system based on value generation and customer service measures."

"We assess staff based upon their customer service skills as well as their sales now. So a branch cashier can earn themselves a performance-related bonus because they're great at customer service."

SENIOR LEADERS GO ON THE ROAD TO SOLICIT FEEDBACK

Barclays also has a regular series of road shows, where staff can engage with senior leaders and talk about strategy and feedback issues that are preventing them from providing excellent service. They are also given the opportunity to score the leadership on the progress being made and how they rate Barclays as a place to work.

“We tell them we want them to use their initiative to get service right, rather than sticking religiously to company protocol—within reasonable boundaries obviously.”

“It’s really important, for example, for a member of staff in a branch or in a contact centre to take ownership of a complaint— solving it wherever possible at the first point of contact. Too often, in the past, customers were passed from pillar to post. The responsibility of the leadership is to provide our people with the tools to do the job. In many cases, all they need is the freedom to be able to use their common sense.”

“The Apteon Respond system can be accessed by every branch, contact center, business banking, and premier team across the UK. More than 26,000 front-line staff can access it. Rolling it out was a huge job but completed in record time.”

BARCLAYS AIMS TO RESOLVE COMPLAINTS AT FIRST CONTACT

As part of their push forward within customer service, Barclays implemented a complaints-management system based on Apteon’s Respond solution. The system means that, to the customer’s eyes, their first contact with Barclays owns their

complaint, apologises, and provides the customer with a written acknowledgement.

If that person cannot resolve the complaint immediately, it can be escalated via the system to someone who can. Again, the customer is provided with a written acknowledgement and clearly named contact details. Barclays considers it vital for its customers to know the name of the individual who is responsible for putting things right.

The vast majority of implementation was achieved in a single quarter, less than a year after the programme formally began. “It means we have improved complaint recording, can respond faster and ensure customers are informed about ownership and progress. Because everyone is using it, it also provides improved management information to identify and address the causes of complaints to minimise recurrence.”

“It also means we have one of the largest complaints management systems in the UK.”

PREVIOUS COMPLAINTS SYSTEM WAS FRAGMENTED ACROSS THE COMPANY

The complaints-handling process across Barclays had previously been fragmented, based on 33 largely independent systems. “We know that addressing complaints effectively can actually build customer warmth. Our Group Complaints Programme was a core component of this new customer service strategy,” said the Group Customer Service Director.

The speed and scale of deployment brought enormous implementation challenges—not least how to ensure connectivity with over 90 different types of desktops and local infrastructures. A myriad of technical problems had to be overcome, but now the system is impressing in terms of user friendliness and the level of operational stability is high.

Front-line staff can now escalate complex complaints to teams of dedicated, experienced complaint handlers in nine new regional service recovery centers. Colleagues from these centres regularly get together to share experiences and agree on best practices, thereby continually improving levels of service recovery provided to their customers.

Customers no longer have to repeat continually the same complaint to different members of staff. They know from the outset that their complaint has been recorded and are provided with the name of the person who is responsible for investigating it and getting back to them with an initial response within two

working days.

As part of the programme, the team has implemented a new suite of management information systems that identify the root causes of complaints. This allows operational management to attack and improve existing processes to minimise the level of complaints in the future. This is one of the major strategic benefits delivered by the Group Complaints Programme—Barclays wants to be a company known for having few complaints but, when they do arise, one that addresses them effectively and quickly and ensures they do not recur.

Interested in learning more about Apteian and Respond? Please contact us at 01604 614100 or email us at enquiries@apteian.com.



About Apteian: Apteian helps businesses profit, innovate and grow where the work gets done—in the call center, on the floor of the factory, at the end of the assembly line. That's where Apteian's CRM, ERP and Supply Chain software applications enable nearly 5,000 customers to satisfy their customers, operate more efficiently and stay at the forefront of their industry.

Apteian is where software WORKS. For more information, visit www.apteian.com.