**Background (Context)**

Capita is structured into three divisions, these are:

* Customer Experience
* Public Service
* Portfolio

I work within Capita’s Customer Experience division. Our division’s vision is *‘Capita Experience delivers outstanding customer outcomes, so that every contact is a positive one’* (Capita Intranet, 2022).

Looking at how this strategy fits with stage three of Kotter’s Eight stage process (Kotter, 2012, p13), the vision must be:

**Imaginable:** This vision is simple, empathising that our services should be outstanding and positive

**Desirable:** The outcome of this vision is to create a positive customer experience. We are all customers, and many of our employees will be customers of the services that our clients provide. This is an outcome that we should all desire

**Feasible:** If we do what is right for the customer, and do this is a professional and friendly manner this should be something that we can achieve

**Focused:** This vision is focussed on our advisor to customer interaction, which is the core of what we deliver for our clients

**Flexible:** This can be applied to anything that we do to support the advisor to customer interaction, including Information Technology, Management Information, Continuous Improvement, and Insight

**Communicable:** This vision is short and specific to what we deliver. If our employees only remember the overall sentiment of the vision, this should still be sufficient to ask “will this improve the service we provide”

Supporting this vision is a single high-level strategy that focusses on how this vision will be achieved. This strategy is:

*“To help our clients digitise their interactions with customers, members and other stakeholders, and move towards an integrated data-driven, insight-led and personalised customer experience”* (Capita Intranet, 2022)

This strategy states our desire to implement a digital transformation, and the purpose of this transformation. Even without an understanding of what a digital transformation is, it’s still possible to understand what we are aiming to achieve.

The strategy also shows that we intend to work in a partnership with our clients to drive digitisation. As a provider of outsourced customer services, it is very rare that we host all the technology to support a customer interaction. Working in partnership, we can implement services on the client’s platform, which increase the scope of what we can achieve. To support this element of our strategy we have appointed Partnership Directors who are responsible for influencing what we can achieve with our clients.

The culture of Capita is a hierarchical one, however this isn’t the only culture within the company. We have an Innovation team who work across all the Capita divisions, and they operate as a holarchy, which gives the team the autonomy to investigate and instigate processes and systems that may by disruptive to our standard operating rhythms. There can be challenges running a holarchy within a hierarchy (Growth et al, 2021, p21), this friction has been reduced by establishing the Innovation Team outside of the three divisions, reporting directly into the overarching Capita Group.

This team have a policy of recruitment of advisors who take calls and have an interest in software development – as this helps the team to identify problems and develop solutions that address challenges facing our front-line teams. This is in line with the definition of innovation that ‘demands disruptive innovation that challenges established norms’ (Berman and Marshall, 2014, p1).

**Analysis**

This analysis focuses on the digital transformation of speech analytics. Our existing speech analytics platform received an overnight batch of calls extracted form one of our call recording platforms (we have three different recording platforms within the business). Once the calls are processed, the calls are categorised based on unique words or phrases that were said in the conversation – these rules are configured in advance. The output of this call categorisation is used to generate reports that the client areas use to address outlying behaviour (examples: excessive non-talk time, or process adherence). Specific insight sprints can be performed on the call categories to feed into improvement projects and client meetings.

The digital transformation of speech analytics has allowed the call categories to be identified as soon as the target words or phrases have been spoken on the call. The software then uses these categories to prompt the advisor to follow a specific process (example: priority call transfer), or to remind the advisor to follow a standard process (example: client specific call closure). These prompts are split into two categories, to ensure that the high priority prompts are not missed. These are:

* **Compliance prompts:** Focussed on data protection, and the transfer of calls to a specialist team when a customer’s device has failed in a potentially dangerous way.
* **Behavioural prompts:** These remind advisors to follow best practice when open, closing the call, and reminders of important process.

The real time prompts are expected to improve the call handling, and increase the call quality, this should be the result of prompting the advisor to follow the correct process.

The second benefit we expected to see was a reduction in call duration. This should be a result of automating the notes that an advisor should add to the Customer Relationship Management (CRM) system, which summarise the conversation with the customer.

This analysis focusses on the impact that the digitisation of speech analytics has had on call duration.

The software was first launched on client1 in February 2022. After the initial roll out of the software, advisors were pulled into ad-hoc session to refresh them on the software and get feedback on how the software impacted their interaction with the customer.

We didn’t have access to system usage until 25th March. Once this audit log was made available to Capita, we began issuing reports on the number of agents logging on to the system. These reports were issued frequently (initially daily, and then weekly) until a live report became available in the system. This was added to the software on 19th October 2022.

Two internally published papers looked at the link between system usage (Welsh, Sep 2022) and (Ross, Aug 2022). Both papers looked at data from the real time speech analytics platform to identify system usage and compared this to call duration reports from out telephony platform. Neither of these reviews could see a reduction in call duration that could be linked with the use of the real time speech analytics software. At this time, the reviews could only compare system log on events to indicate that the software was being used.

On the 24th of October 2022 the software developers added the copying of automated notes into the user audit. After this change went live, I could see that no users were currently using the ‘copy notes’ function. To test that the change was successful, we asked an advisor from client1 and client2 to copy the notes from one call and verified that this was captured as a log within the system.

I then gave the output of the initial report to the two operational teams (client1 and client2), raising awareness that the process was not being used, and I showed them where the live reports could be accessed. Both client operational areas were asked to investigate why the notes copy function wasn’t in use, and to obtain feedback from their teams on the use of the product. The feedback was:

* They didn’t realise that the system was a business as usual (BAU) system, and thought that the training they had was for a short-term trial
* Many advisors didn’t know that the system automated notes from their calls
* Some users were unaware that the real time speech analytics tool existed
* Team managers felt that their teams should have been aware, as this was part of the standard training process

Kotter (2012) states that for a change to be successful, the message needs to be delivered across multiple channels, multiple times to break through the inertia that prevents a change being implemented.

By relying on the initial training that an advisor receives, we can be certain that the training has been delivered. However, this is a small part of the training that we deliver to new advisors. The ability to copy notes from a live speech analytics platform will not be seen as an essential part of the call taking process and may be quickly forgotten as the new advisor struggles to remember all the essential systems and process that they must complete.

The fact that advisors were either unaware of the software, unaware of the notes copying process, or thought that the real time speech analytics software had been a trail that had concluded, shows that the message had not been delivered in a way that embedded the change into a business as usual process, and the purpose of the change was lost.

To ensure that the benefits and purpose of using the software was understood, awareness of the software and the benefits of using the software this should have been discussed frequently in team sessions.

The managers had assumed that because their advisors had been trained on the use of the software, they would be using it. This indicates that they took no ownership in driving the use of the real time speech analytics solution, and this may be a large factor in the failure of the ‘notes copying’ process, preventing any potential benefits from the process to be realised.

**Recommendations**

The goal of this digitisation change is to reduce call time, by automating the creation of account notes for the CRM. This will benefit the customers by reducing call queuing time, supporting the vision that every contact is a positive one (Capita Intranet, 2022).

To do this, we need to increase the level of communication given to the advisors. Initially this should spell out what we want them to do, and why this is important. As our advisors are all home based, the use of the automated notes should be discussed on Microsoft Teams (online) meetings, and in one-to-one sessions with the advisors.

The communication should be clear that we believe using real time speech analytics to create automated notes will reduce the call duration, and that we will be monitoring usage, and the impact that this is having on call duration.

In attrition to driving advisor use of the automated notes, Team Managers should be encouraged to check that their teams are using the ‘automated notes’ function. We currently have a joint weekly meeting with the operational teams for client1 and client2. Over the last two weeks I have demonstrated how they can use the reports to see who has been using the notes copy function, and this usage has increased over the last week.

In the same context that the Team Managers should be talking about this with their advisors, I recommend that the Team Managers are reminded about the importance of driving the use of automated notes.

This process of regular conversations should raise awareness of the change, and the purpose of the change. The increase in communication is in line with step 4 of Kotters’ eight stage process of creating major change (Kotter, 2012).

Kotters’ step five includes removing obstacles. At this stage I believe the key obstacle is inertia, however, it is possible that there are reasons why advisors are not using the ‘copy notes’ function. To identify any other obstacles, I’ve asked the Team Managers to seek feedback from their teams. I recommend that we continue with this approach, driving the team to get feedback from different advisors each week.

Kotters’ step six is to generate short term wins. Within the weekly management sessions, I recommend that we review the volumes of advisors that have used the ‘copy notes’ function, discussing the week-on-week change, and highlighting where usage has increased. As Team Managers can see increases in usage as they happen, this creates a very quick feedback loop, so that they can assess the impact of their conversations with their team.

If we can successfully follow through with steps five and six, I should be able to assess the impact that copying notes has on the call duration, by linking the system audit with the telephony data. If there is a relationship with the use of note copying and call duration, we can give creditability to the process (Kotters’ seventh step) and use this to move the change into a BAU process that benefits our advisors, and our customers.

**Reference list**

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