The problem

Traditional call centres assign a customer based on the next available Relationship Manager (RM). However, the skillsets and needs of the customer is often not accounted for by the RM. The differences in customer needs and RM knowledge may not always align. Therefore, there is a rejection of customer needs and this leads to upset customers. Customers that do not feel valued will not return as repeat customers. Also, through word of mouth this hurts the company’s image. As such, the company may find it difficult to sell more holiday packages and return profit.

Objectives

Therefore, a new solution is required. The new system should enable the pairing of compatible customers and RM’s in terms of wants and knowledge, respectively. RM’s must undergo constant evaluation in their ability to sell and provide information on holiday packages. Similarly, customers will be evaluated in their likelihood to purchase a holiday package. Both parties will be ranked out of a 10, 10 being the most likely to purchase or most knowledgeable on holiday packages. The ranking system will be achieved by a separate tool named the profiler tool and this data will be utilised by our system to produce the pairing of customers and RMs. Furthermore, during busy times where the pairing of customers to RM becomes unmanageable, an interactive voice response will be utilised to prompt the customer for responses. Once an RM is available, they will be able to take over the call.

The customer is of top priority and as such their needs need to be identified and understood. The new system allows the pairing of an RM that will best understand these needs and wants. As such, the new system should increase customer satisfaction and as an onset increase organisational profit.

Stake holders

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| **Position** | **Project Role** | **Level of Interest** | **Level of Influence** | **Description** |
| Customer | User | High | Low | The customer will be utilising the system in order to be assigned to an RM that will understand their requirements. |
| RM | Manager | High | Medium | The RM will be utilising the system in order to receive customers based on their level of experience and knowledge. |
| Owner | Product Owner | High | High | The owner will want to employ this system to increase the sales of holiday packages |