

Maynardleigh - Business Development Meeting

SPIN Sheet

1. Name of the Company: Manlife (customer service team)
2. Contact Name: Ruki Khan
Designation: HRBP (1)
Contact Details: _____
Email Address: _____
3. Inquiry on/ Stated Need: Team Building
4. Meeting Mode: One-to-One/ Telephonic / Video Chat or SKYPE 9/1/18, 6.00pm
5. Brief about the business (OPR): Attached

6. How does this company serve the "Basic human need"?
Insurance

7. The Business Model:

8. Where are they mainly based?
Gurgaon, India

9. Employee strength: _____
10. Turnover: _____
11. Training Budget: _____
12. SPIN (Ask four types of questions during this phase: Situation, Problem, Implication and Needs- the acronym of SPIN)

47-20. (letters that go to the CEO)

SITUATION

i. Who are the target audience

45
45 people

ii. Job Profile (understand how they contribute to Basic Human Need : try and take a simplified approach to how they serve this world)

Managing complaints / Grievances every day. Respond to the customer complaints..

iii. Age , Qualification - (grade of collegesA or B or C), Experience in years

9 years to 15 years in Bank
24, 25 years

iv. Span of control (do they lead people , or , are individual contributors)

v. What is the current state VS desired state (expectations- knowledge, skills, attitude, habit)

Current State	Desired state
<ul style="list-style-type: none">→ Too much work pressure→ Lack of work life balance→ Feeling of a punching bag→ Feeling of thankless job.→ We get scolding & rebuking from customer internal & external	<ul style="list-style-type: none">→ Culture of pinch to motivate & inspire them→ You guys are enthusiastic & hard worker→ Complaints is a gift, you are a contributor

→ Complaint is a gift. Look in yourself & smile in what you do.

maynardleigh

CVP. Ashish Sharma - tutor

SPIN

S = Situation

Seek hard facts, and soft information, to understand the background and the opportunity you are facing

Keep your questioning short but thorough

Sample Questions

- How did you hear of MLA?
- Why are we here?
- Who really owns the issue — e.g. a particular line manager, the CEO, the HR person? — see also Miller Heimann: who is the customer?
- What exactly does your company do? Is it currently profitable?
- What is its position in the marketplace: e.g. a leader, number two, a new comer?
- How many people work for it and what is the turnover over staff — i.e. how are you managing your talent?
- Where are your people mainly based, geographically?
- What is the structure of the company — could I have an organisation chart?
- Does your company have any key business goals you can share?
- Who heads up HR or Learning and Development and who is their boss?
- Who are the key people with responsibilities for training and development?
- Would I be able to meet them at some time?
- Do you have a budget for tackling this issue, if so what is it?
- When do you finalise your training budget during the year?
- Who else in the company might be interested in what we offer?

→ Business is growing ↑
complaints are also ↑
→ Amount of work ↑

PROBLEM

- i. Gaps in performance, quality or relationships (repeated probe from previous question)
- too much of compliance and major escalations
and holding in case of escalations.
→ everyday we are resolving queries
it has become visible now.
- ii. How have you arrived at these gaps (one person said, you observed, multiple leaders said, is it from training need analysis, is it a problem diagnosed at company level, has it come from a customer / consumer / partner / senior leader)

- iii. Validate the source of problem and try and rationalise it (percentage on customer score, talent engagement score, performance index, documented observations, result of a team hurdle). It will be good to record the name of the person who has articulated the problem statement. metrics

Implication

- i. How has this problem impacted the business (ex increase in cost, decrease in revenue, opportunity lost, brand tarnished, attrition, low morale, reduced customer satisfaction, conflict, low internal service, wastage of time, money, bandwidth)

Attrition can be a concern

Escalations go to COO

was 6-10% (last 2 years)

Need

- i. What according to you is the solution to bridge this gap

Myndel shift
Workshop should be refreshing
something new. No overlapping
with claims & understanding of quality elements

- ii. Have you tried this solution or any other solution in the past

Customer services
intervention (internal)
no other intervention

- iii. How will you measure the effectiveness of this solution (MOS – measures of success)

- iv. What does the solution look like to you (modular , one day , two day , three months ,
bespoke , quickie)

2 days

- v. What level of solution would you like to attend (at the level of knowledge , or practise , or
internalised)

Internalized

same thing can be done in different way
Vishu-Mam yeh 5 times ya dekh
waha hoon.

Monotony in workshops
at times we want new.

maynardleigh

Jigyasa Sharma

From: Rubi Khan (Gurugram HO - Human Resources) <rubi.khan@maxlifeinsurance.com>
Sent: Tuesday, December 12, 2017 6:57 PM
To: Jigyasa Sharma
Cc: 'Steeve Gupta', Anand Mittal
Subject: Intervention for Customer Service -9th to 11th February

Hi Jigyasa,

Please find the below challenges in the CS team-

- Too much of work pressure
- Lack of work life balance
- Managing Complaints/ Grievances everyday
- Feeling of a punching bag
- Too much of compliance and major escalations and scolding in case of escalations.
- Feeling of thank less job.

I request you to share the appropriate name for the workshop followed by diagnosis and approach note.

We are looking at closing everything by 15th January.

Warm Regards
Rubi Khan