

The 2010 Customer Service and Employee Engagement Conference

Integrating Customer Service with Strategy and Culture

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Kaplan & Norton

**BALANCED
SCORECARD**

CERTIFIED

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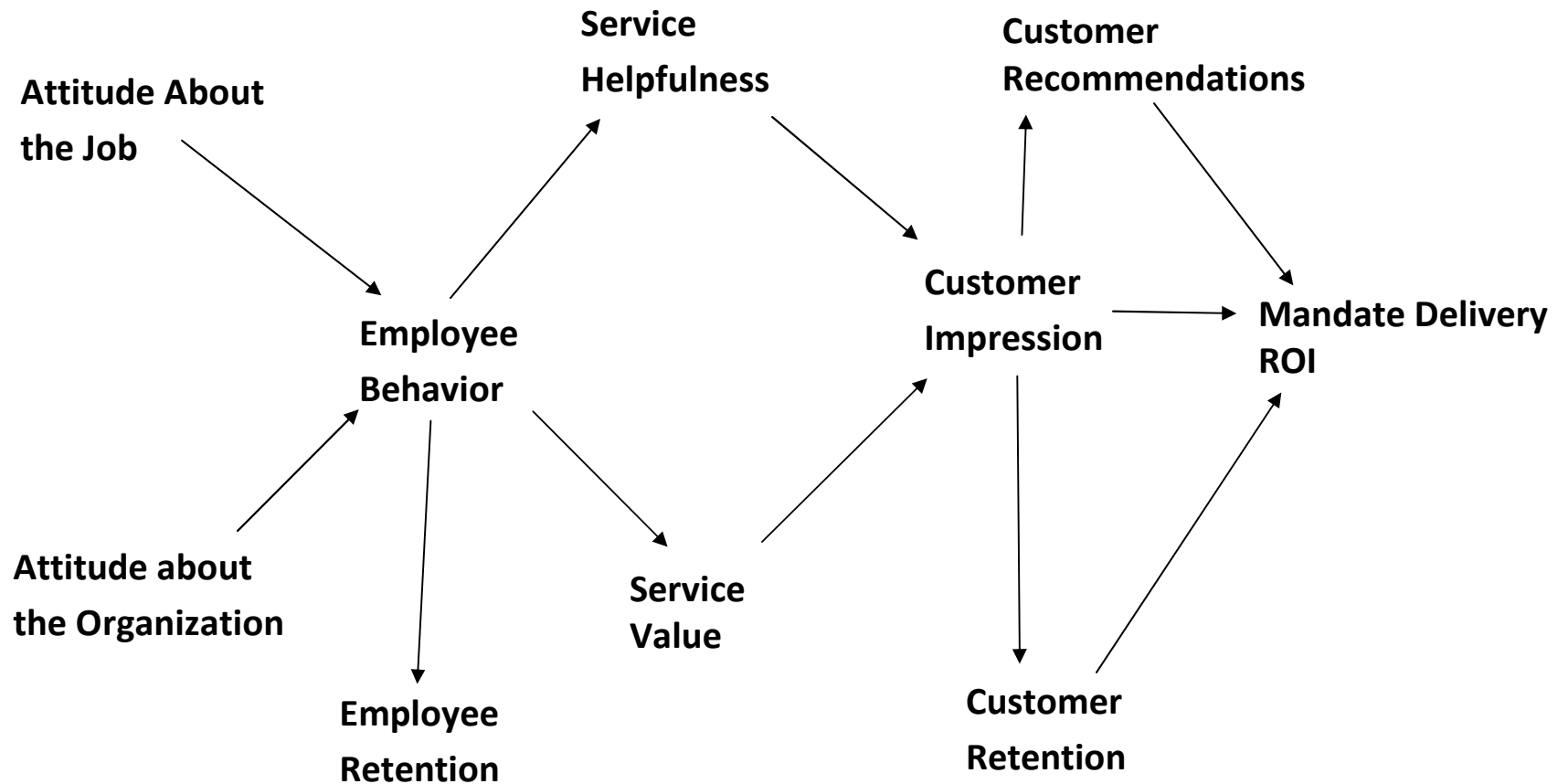
Key Questions....

- ▶ What is our Strategic Agenda?
- ▶ Is Engagement on our Strategic Agenda?
- ▶ If not, how can we bring Engagement on board?
- ▶ If yes, how can we improve our Engagement game?

Employee Engagement

“...no company, small or large, can win over the long run without energized employees who believe in the mission and understand how to achieve it...That's why you need to take the measure of employee engagement at least once a year ...” (Jack Welch)

Employee-Customer-Value Chain: Sears Model

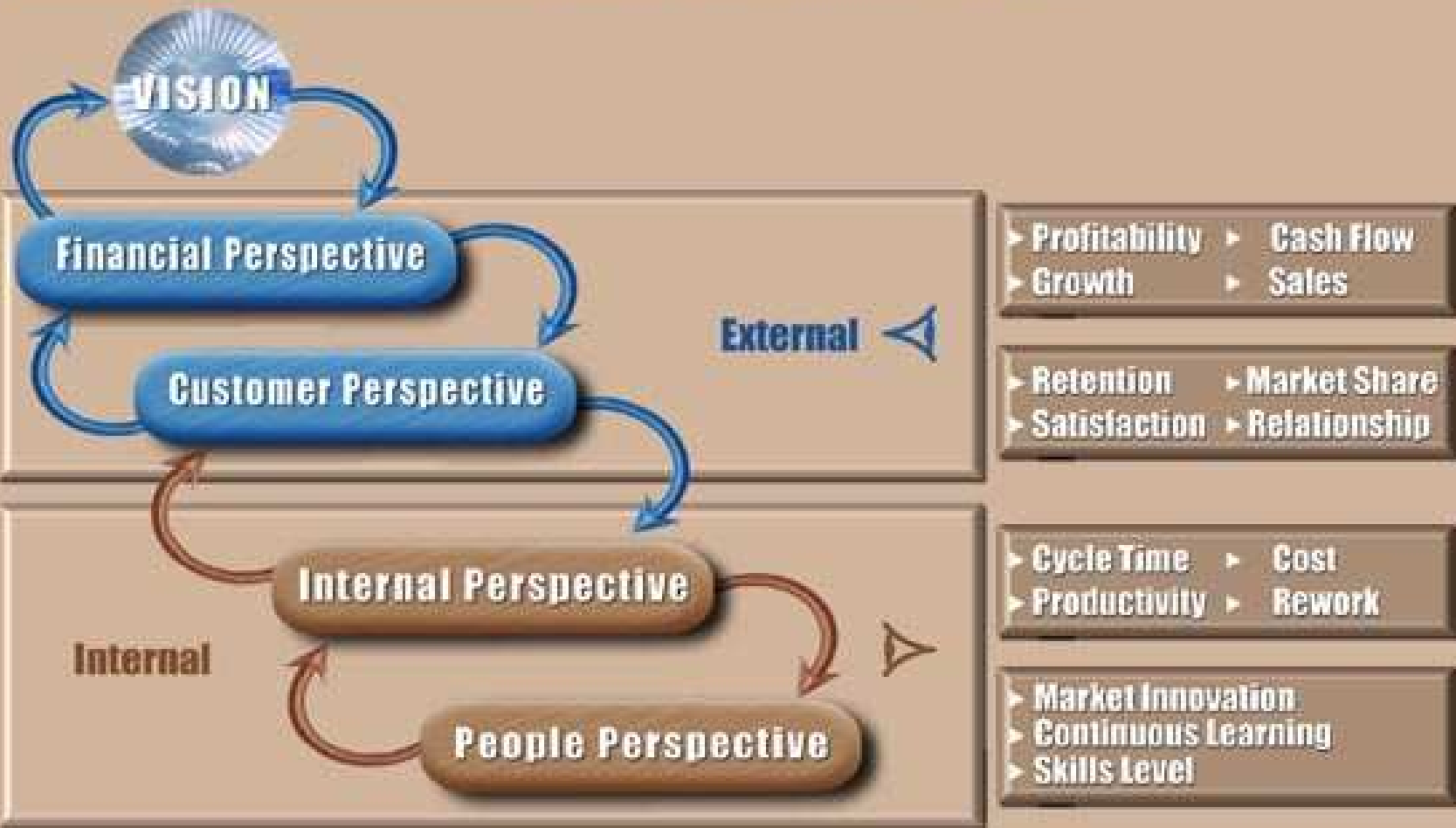


Adapted from Harvard Business Review (1998)

Engagement and the Strategic Agenda.....

- ▶ We need to have the right conversations with both our internal and external customers
- ▶ When repeated over and over again, the right habits become part of our culture
- ▶ We need to embed engagement into our strategy and measure progress
- ▶ The way the organisation is structured enables or frustrates effective service delivery
- ▶ What gets measured gets done

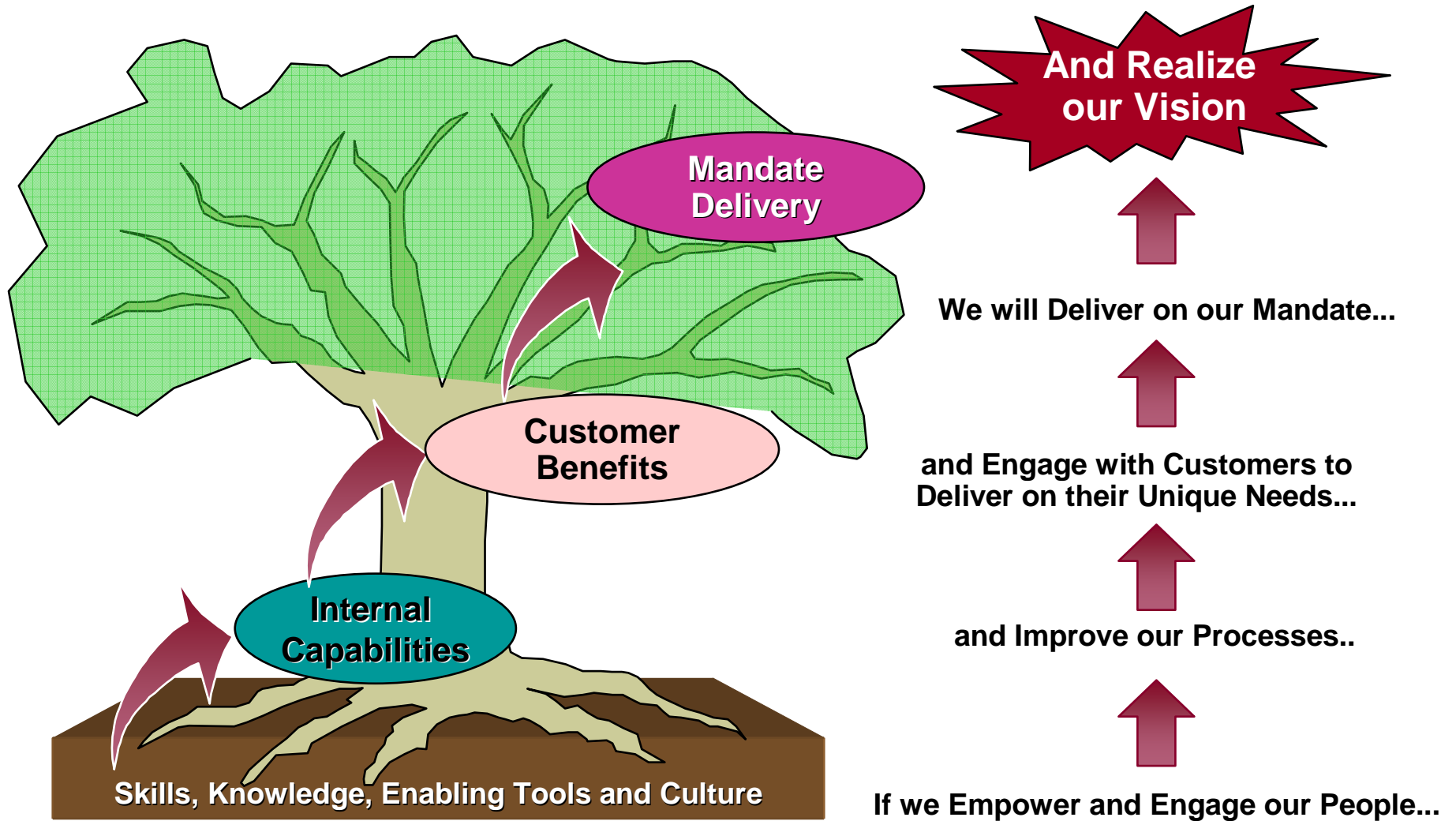
BSC Four Perspectives



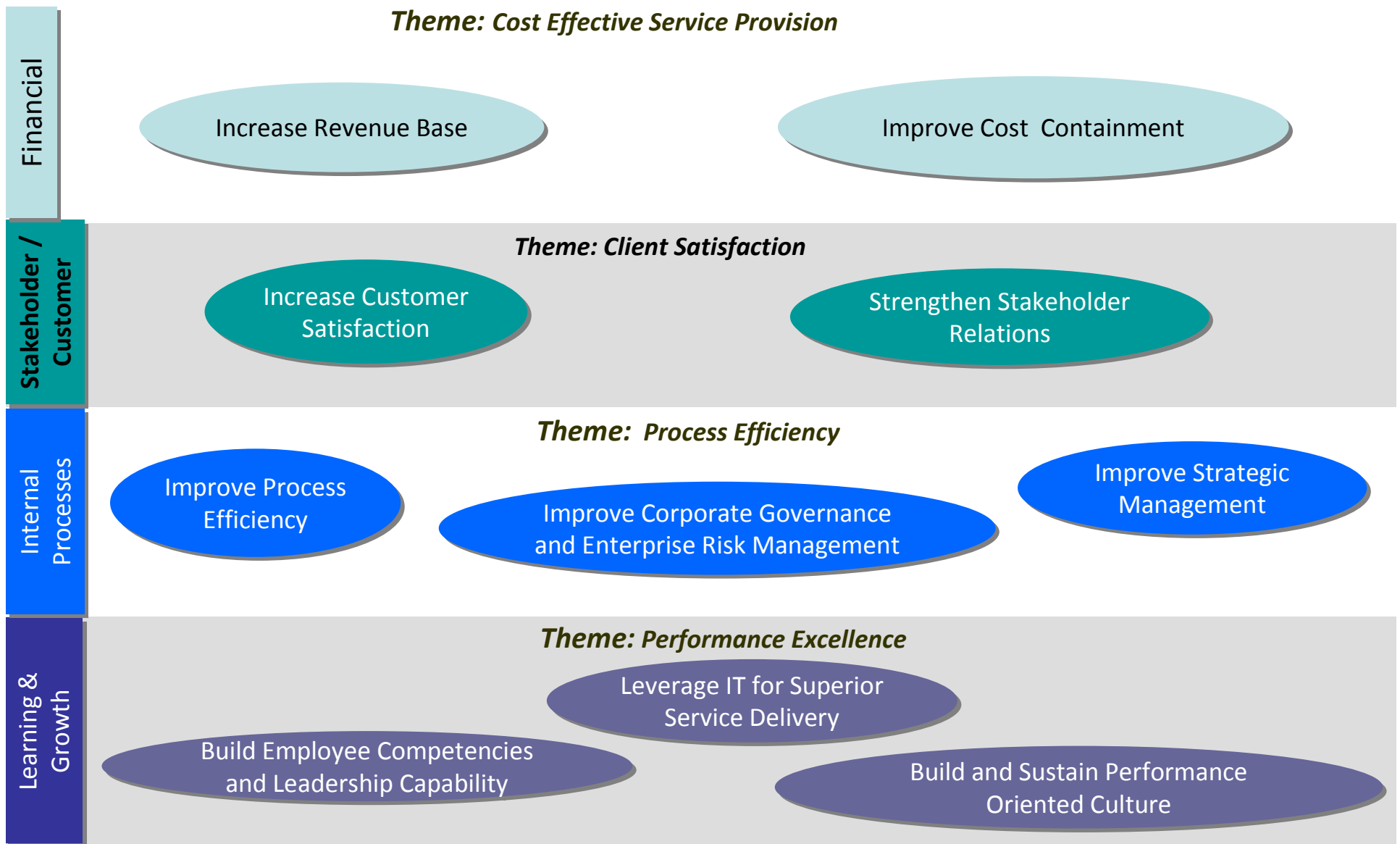
Strategic Model



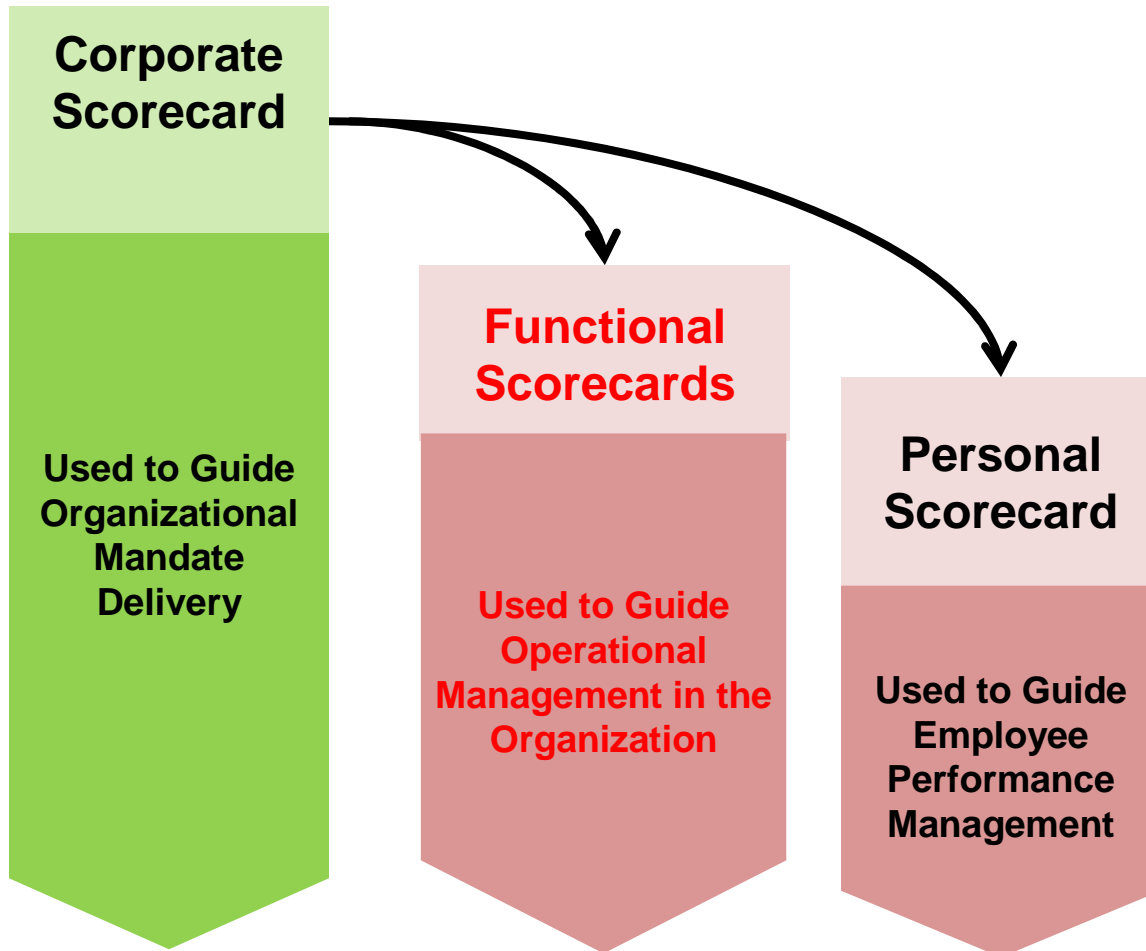
The Strategy Tree



Strategy Map - Financial Services Organization in Botswana



Cascading Strategy



How HR Creates Value

- ▶ Align HR and business strategy
- ▶ Recruit, retain and develop the right talent
- ▶ Drive employee engagement and performance management
- ▶ Advocate the link between employee engagement and customer service
- ▶ Facilitate change

HR Scorecard - Financial Services Organisation in Botswana

PERSPECTIVE	STRATEGIC OBJECTIVE	MEASURE	TARGET	STRATEGIC INITIATIVE
Customer/ Stakeholder	Increase Customer/Stakeholder Satisfaction	Staff Satisfaction Rating	90%	Develop and Implement Service Charter and Service Level Agreements
				Conduct annual Climate Surveys
Core Business Processes	Improve Key Business Processes	Compliance with Service Charter	100%	Map Key HR processes
		Turnaround Time	100%	Conduct Familiarisation Training on HR Policies & Procedures
	Leverage IT for Superior Service Delivery	Level of Automation of Key HR Process	100%	Automate Key HR processes
Learning and Innovation	Embed a Culture of Performance	Employee Performance Index	3 (4 Point Scale)	Performance Management Training
	Improve Employee Competencies	Competency Gap	10%	Develop Competency Framework and Assess Competencies
				Talent Management Strategy
	Build Leadership Capability	Leadership Engagement Index	90%	Leadership Development Programme
Financial Stewardship	Ensure Effective Resource Utilisation	Budget Variance	100%	Budgetary Techniques Training

How Marketing Creates Value

- ▶ Identifies clients and client needs
- ▶ Develops products and services to meet current and future client needs
- ▶ Develops value proposition
 - ▶ Product and service level
 - ▶ Organizational level
- ▶ Solicits feedback on levels of customer satisfaction

Marketing Scorecard (Suggested) - Financial Services Organisation in Botswana

PERSPECTIVE	STRATEGIC OBJECTIVE	MEASURE	TARGET	STRATEGIC INITIATIVE
Customer/ Stakeholder	Increase Customer/Stakeholder Satisfaction	Customer Satisfaction Index	90%	Develop and Implement Service Charter
		Brand Tracking Index	90%	Conduct annual Customer Satisfaction Surveys
				Conduct annual Brand Tracking Survey
				Implement Customer Relationship Management Strategy
Core Business Processes	Improve Key Business Processes	Compliance with Service Charter	100%	Map Key Marketing and Customer Service Processes
	Leverage IT for Superior Service Delivery	Level of Automation	100%	Automate Key Customer Service Processes
Learning and Innovation	Embed a Culture of Service Excellence	Customer Satisfaction Rating	90%	Customer Service Training
		Employee Performance Index	3 (4 Point Scale)	Performance Management Training
	Improve Employee Competencies	Competency Gap	10%	Assess Customer Service Competencies
	Build Leadership Capability	Leadership Engagement Index	90%	Leadership Development Programme
Financial Stewardship	Ensure Effective Resource Utilisation	Budget Variance	100%	Budgetary Techniques Training