

# Analyze Case Study: Improving client service levels



## Executive summary

Analyze Consulting was approached by an organisation that was considering re-organising its client-facing teams. The key problem at hand was reduced client service levels, and the business hoped to improve the quality of work and speed of response to client needs. To do this, they needed to understand the roles and responsibilities of each client-facing team clearly. Analyze Consulting successfully assisted them in identifying roles and unpacking the scope of work performed by each team. Analyze also revealed further insights during the project, which provided the client with a sound base for determining the way forward with re-organising the teams.

## Challenges

A lack of visibility of the work performed by each client-facing team presented several challenges to the business:

- The teams complained that they were hampered by a lot of administration tasks and were unable to focus on their core responsibilities of client servicing.
- The teams were not aware of how their processes fed into other teams and this had a negative effect on timelines and client servicing.
- There was a perceived lack of quality of work produced by the various teams.
- There was no consistency in the scope of work performed by staff in similar roles in the teams

- There was duplication of work in some areas, which further added to the delays in executing client instructions.

Understanding  
roles and  
responsibilities  
to create an  
optimal  
organisational  
structure



### How Analyze helped

This project involved quantitative data gathering in the form of a survey to the client servicing teams. The survey asked for details around tasks carried out by the various roles within a team to define the scope of each.

We then followed up the survey with qualitative data gathering. We conducted workshops with small teams, across all regional offices, to validate and gather further detail about the specific roles and responsibilities of members within a team.

We then analysed the data, drawing common themes and overlaps in roles and responsibilities. The analysis revealed that the highlighted challenges were not only impacted by lack of visibility of roles and responsibilities but that other people, process and technology issues were contributing to the quality of work and having a negative effect on client servicing timelines.

We highlighted the recommendations and quick wins that addressed these challenges and presented them to the senior management team.

### Future plans

Instead of only looking at roles and responsibilities, management is now taking a holistic approach in considering the way forward with re-organising the teams. Specifically, they are now looking at current people, process and technology initiatives to see which ones align with the raised issues. We developed a roadmap to address the remaining issues.

### **Need to restructure and optimise your organisation?**

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