

COMPANY OVERVIEW (100 WORDS MAXIMUM TO DESCRIBE YOUR ORGANISATION/DEPARTMENT)

Established in 2008's recession, Carpeo is a dynamic, world-class, multi award-winning customer contact operation serving blue-chip clients. Innovative Cloud-Based (Agile) CRM technology combined with talented, committed and highly responsive teams mean we respond positively to the most complex and demanding challenges. Carpeo has doubled revenues year on year since 2012. By partnering clients in their Transformation Journey and challenging them to think and work smarter in customer contact, we strive for mutual improvements. Our mantra is: Every Day, Every Contact... Even Better! We optimise and integrate channels and systems, then transform customer contact to effectively underpin "Customer Innovation Delivered"

17) Outsourced Contact Centre of the Year

This category is for an **outsourced** contact centre with a highly successful business relationship with their client. To be successful in this category you must demonstrate: A clear understanding of your client's aims and objectives. How you've helped them through the effective and professional delivery of a range of services. How you've implemented two-way communication channels between the outsourcing front line and client decision makers. Evidence of effective integration, investment in client relationship and transparency.

Please address the following questions/requirements:

1. Demonstrate your **understanding of your client's aims and objectives** and how you've worked together to fulfill these successfully

Founded in 1897, the RAC has 8 million members in the UK. Whilst it is not the biggest in the market, it invests heavily in technology in pursuit of being the best motoring organisation and vehicle recovery service in the UK.

1.1 In an incredibly competitive market, customer retention is big business. So are the commercial opportunities for cross-sell and upsell of RAC's other products. Therefore Membership Renewals play a vital part in RAC's overall marketing, business and revenue growth strategy. RAC wanted to renew memberships and grow their business. In 2014, RAC found Carpeo through the SWCCF and RAC's Head of Sales & Service, Stuart Aris, commented "*Carpeo's performance and attitude stood out from the rest.*" The value of that first decision to work together has been strengthened and rewarded ever since.

A proof of concept "light trial" in June/July 2014 led to 2015 as the first full year Carpeo worked alongside RAC. An outsourced outbound call centre meant a completely new sales channel for the RAC and it delivered 11,000 units in 2015. According to Stuart Aris "*This was a FANTASTIC result!*"

Total Sales via Carpeo from April 2015 to April 2016 are 14,210.

1.2 Whilst it is one thing for a Call Centre to understand a Client's campaign objectives, it is quite another for them to understand a Client's overall business growth objectives, which is where Carpeo really stands out from its competitors.

The RAC is listed on the London stock exchange and in 2014 it attracted investment from Singapore's sovereign wealth fund. The brand is very visible and financially sensitive to media coverage. In Stuart Aris' mind, the significant sales and revenue growth driven by this successful outsourcing partnership has undoubtedly built RAC's brand and its attractiveness as an investment proposition. He says "*Carpeo's responsiveness to RAC's changing needs supports our position very well in the financial world. Carpeo's Director David Williams understands this and the RAC very well indeed.*"

- 2 Provide **two examples** of how you've helped them through the effective and professional delivery of a range of services

2.1.1 **Summer 2015: INBOUND CAMPAIGN - 50 agents with 1 week's notice**

In Summer 2015, RAC faced a growing level of call volumes which it was finding difficult to handle effectively in-house. Recognising its own limitations, RAC needed to act fast because providing a great customer experience at all points of contact is absolutely vital to protect its investment in its brand.

RAC had the option of choosing any one of several call centre partners. However, Stuart Aris says *“We didn’t hesitate to call David Williams at Carpeo because we knew he would respond. We know Carpeo has a “Can-Do” attitude, but while many companies pay lip-service to this, Carpeo is absolutely genuine. David is totally accessible and there when we need him.”*

Stuart adds *“With our short term objectives, David dropped everything to help us out. There was no quibbling. We needed to set up a major campaign within ONE week and it was done. We gave Carpeo the problem. We’ve never had to worry. We have our own problems here in Bristol so we handed over the entire challenge to Carpeo and you owned it!”*

In practice, RAC’s request meant building an entire campaign from scratch in 5 days instead of 6 to 7 weeks!

Carpeo uses PRINCE II Project Management methodology and the internal project team comprised an internal Project Manager, IT manager and 2 internal managers.

While the recruitment process went into overdrive, alongside this, Carpeo sourced telephone numbers, wrote scripts, confirmed call dispositioning and management information required. Attention to detail is not optional on campaigns of this nature – it is a fundamental building block!

Everyone pulled out all the stops and worked long hours to profile the job role, confirm the required skillset, write job adverts and set up an assessment centre to recruit 40 new people externally. 10 existing staff were transferred from other Carpeo campaigns to create a core of agents trained the Carpeo way. They could then seed and spread our core values into the team. Two groups of 25 received three weeks training from RAC staff to absorb product knowledge and instil RAC’s blue-chip standards.

Such a fast response was only possible because CARPEO works closely with 3 local recruitment agencies; Mainline Employment, C & D Recruitment and A&B Recruitment. They are equally responsive to Carpeo’s needs having listened in on calls, sat in on campaigns and understood the type of candidate Carpeo and RAC were looking for. The depth of these existing partnerships enabled Carpeo’s fast response. RAC is not the only outsourcer in the equation! Carpeo leaves the recruitment agencies to do what they do best too!

Recruitment agencies conducted preliminary telephone interviews, registration, handled checks to ensure eligibility to work in the UK and referenced candidates to ensure there were no criminal convictions. Internal Senior Managers were moved across from other campaigns to provide mentoring and individual support for new agents. This resulted in a smooth “Go-Live” experience and a seamless transition from RAC’s in-house to outsourced solution.

2.1.2 SIMULTANEOUSLY: RAC REQUIRED A NEW “BLENDED CAMPAIGN” APPROACH

But that wasn’t all - Alongside the major inbound outsourcing project, RAC simultaneously requested that the existing BAU team be trained to handle both inbound and outbound calls. This was the first ever RAC Blended Campaign and the mentality for handling inbound calls is very different. So a 5-day training course was crunched to just 2 days and also delivered by RAC staff.

2.2. RAC SEASONAL PEAK WORKLOADS DEMAND TOTAL SCALEABILITY

The nature of RAC’s business is utterly seasonally based on when people take to the roads and travel, as well as adverse weather conditions. Main peaks for sales (and therefore membership renewals) are Easter, May Bank Holidays, Summer School Holidays, Christmas and New Year. In a really cold winter call volumes peak too. When it snows, the number of calls for membership rises instantly. This leads to exaggerated peaks and slow periods which would be difficult for a mainstream business to manage.

Therefore, the RAC needs a flexible workforce which can shrink and increase headcount at a phone call’s notice.

They need a partner who understands these peaks and troughs and can plan for them.

Carpeo has a training programme on all its campaigns called **“Fit For Peak”**. It focuses on workforce management aligned to the client’s forecast to make Peak a great and enjoyable experience for all agents and managers. It involves putting in place the right management support structure to underpin success for the Carpeo client.

Whilst acknowledging the stresses and strains of Peak, Carpeo offers staff an opportunity to shine during peak and this is where decisions are made about future internal promotions.

3. How you’ve implemented two-way communication channels between the outsourcing front line and client decision makers.

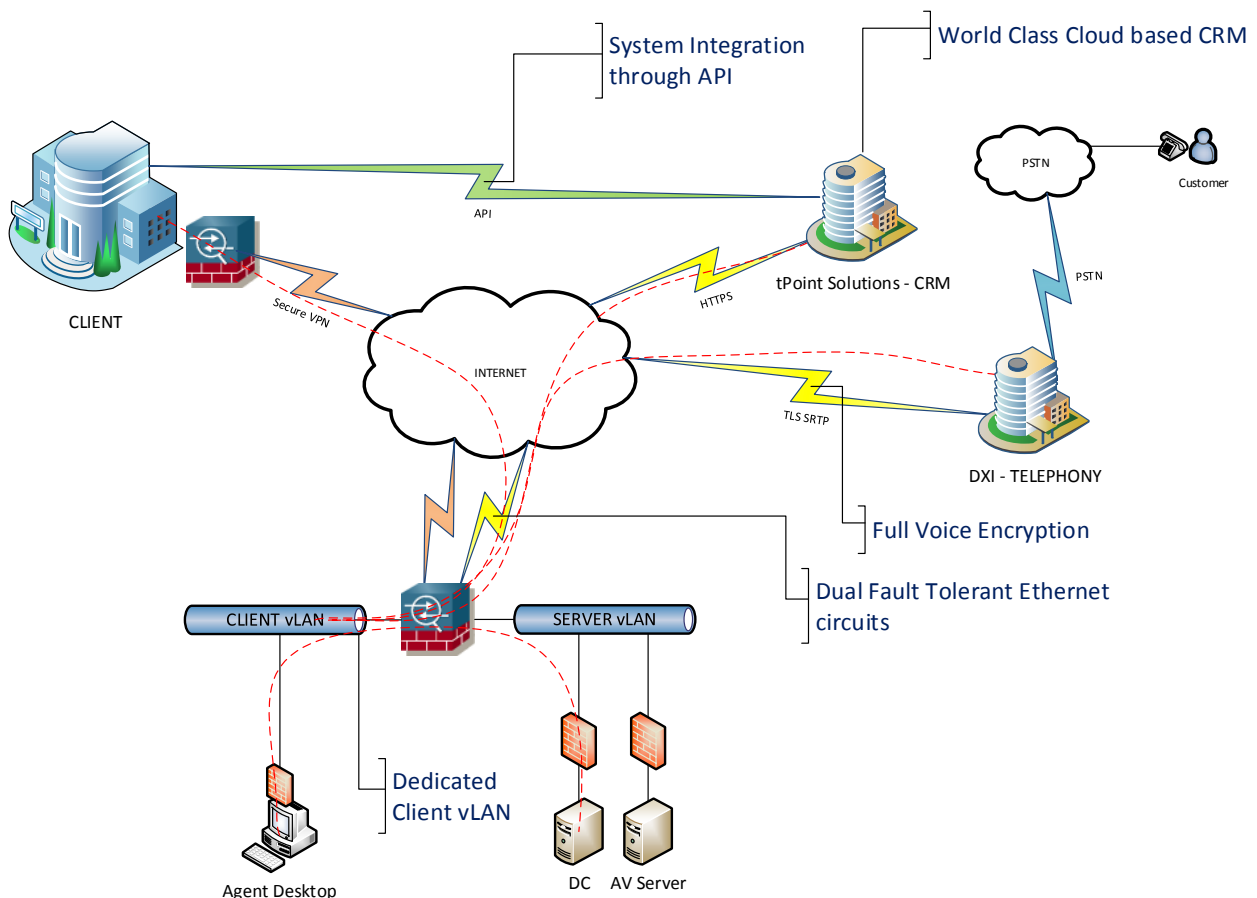
With any outsourced campaign, Client communication is vital at all times but ESPECIALLY during periods of Peak activity and volumes.

There are several aspects of communications: Functionality, Scope, Frequency, Management Information and Style.

3.1 FUNCTIONALITY: HOW

Carpeo’s IT Systems Integration runs through an API and a VPN (Virtual Private Network) which allows clients to “Live-Listen” to calls through a portal with “Anytime Access”. The cloud-based CRM system is secure, enterprise-grade technology so it can be accessed from anywhere in the world.

RAC’s Stuart Aris says *“Carpeo’s technology is savvy –it’s at the forefront. At RAC, we’re not investing in call centre technology. We rely on our partners to do that for us.”*



N.B. The above diagram looks relatively simple. However, integrating IT systems is never that simple. Every new

client IT system has diverse firewalls, operating systems, software, middleware and legacy IT systems that have to be understood, negotiated and integrated. Only then can they be tried and tested to ensure the communication channel does not fall over at business critical moments. It is a hidden challenge that is crucial to project success.

Although Carpeo has a head count of 275, the IT Team comprises only four individuals so their knowledge, expertise and flexible attitude is absolutely crucial to success. We call them our IT Heroes!

3.2 COMMUNICATIONS STRUCTURE, FREQUENCY & SCOPE

3.2.1 COMPLIANCE

From Stuart Aris' perspective *"Industry compliance is vital because of potential damage to our brand reputation and share price in the event of any bad press. We're selling insurance so calls are highly regulated by the Financial Conduct Authority (FCA). Carpeo's understanding has grown stronger over time so the calibration of calls has now reached practically ZERO! We're on the same page. Carpeo have really tuned into us."* Stuart goes on to say *"However, compliance challenges are ever-changing. The interpretation and guidance change all the time, needing different responses over time."*

Taking the 3 month RAC summer campaign as an example, Carpeo recruited several students and for some, this was their first experience of a full-time job. Working on a blue-chip campaign is a challenge not suited to everyone so Carpeo uses rigorous procedures to instil the correct work ethos. Carpeo Contact Centre Manager Kerry Porter says *"It's all about fair outcomes for potential members and no inadvertent sales pressure."*

Carpeo's managers do not suffer fools gladly. If an agent says something out of line, contrary to their training and Carpeo's strict Code of Conduct, they are instantly disciplined or dismissed – sometimes the very same day. Whilst it may appear harsh to the individuals concerned, this approach maintains professionalism on the campaign and keeps others agents in line.

Kerry Porter confirms *"We take our role in protecting our clients' brand reputation VERY seriously and will not allow anyone or anything to jeopardise this."*

3.2.2. TWO-WAY COMMUNICATIONS: COMPLIANCE CALIBRATION

Samara Brown heads Carpeo's RAC Compliance Team and sends daily email reports to RAC's in-house compliance team. If there is a specific issue with an agent's call, Carpeo responds quickly by alerting RAC by phone to discuss it.

Previously, RAC monitored 100% of calls but in January 2016 cut this to 50% of calls. Until December 2015 RAC held daily meetings with Compliance but as we have consistently achieved compliance targets these are now weekly with RAC Compliance and Carpeo Sales Managers. We listen to calls jointly and hold calibration sessions to ensure we are all scoring calls in the same way and there is complete transparency with everything we do. Individual agent files are reviewed and anyone on a Performance Improvement Plan (PIP) is discussed, as well as Star Performers and those on Red Call Plans (Below 90% compliance on 1 call in a four week period).

The reduction in management time required by RAC to oversee Carpeo has an added benefit that it has delivered significant time and cost savings for both parties.

3.2.3 CAMPAIGN MANAGEMENT – PROFITABILITY

Feedback is VERY detailed, allowing Sales Floor Managers to be proactive on a literally minute-by-minute basis. Call result analysis gives detailed feedback by category of call and by agent, thus allowing the following to be monitored:

- Live reports; real-time agent dashboard
- Number of Decision-Makers contacted

- Average handling times
- Call outcomes
- Sales lead conversion rates
- Transaction cancellations traced back to agent responsible
- Productivity levels

4 Provide evidence of *effective integration*, investment in *client relationship* and *transparency*.

4.1 INVESTMENT IN CLIENT RELATIONSHIP

There are many call centres that could do a reasonably good job with the same criteria. However, the people within CARPEO go above and beyond client expectations on a regular basis. Many companies say they do this (that's marketing hype!) but when clients confirm their supplier genuinely delivers against big claims, that's when it's really worth taking note.

Stuart says "Since Suzanne Avent came on board; there is a steady structure on the team. Carpeo is **SO** proactive. They tell us when we're doing well and not so well. You identify key issues for us. Our performance expectations have regularly been exceeded over the last 15 months – so this is almost a "given" now!" Stuart concedes it hasn't always been plain sailing; there have been mistakes along the way but he confirms the working relationship has become stronger because of the way these have been tackled together. Through it all; trust has grown.

A good working relationship is evident at all levels in the partnership: Samara Brown from Carpeo's RAC Compliance Team says "*It's a very constructive working relationship. RAC never penalises Carpeo when something doesn't work but asks itself how it needs to support us better – and vice versa – for the next Peak period. It's a productive atmosphere of constant improvement without the "Blame Game" found in some working relationships.*" Having worked on Summer 2015's peak campaign with the additional 40 new agents, Samara says "*Under pressure, support from the RAC was second-to none and vice versa.*"

4.2 .1. TRANSPARENCY

Management information drills down to every single phone call made by a particular agent, with specific outcomes. If a problem is identified, there is no hiding. Carpeo is utterly transparent with clients, willingly sharing this information and deciding with the client what outcome is most appropriate. It may be a case of further training or perhaps disciplinary action is required to maintain the RAC brand name and highly professional standards. Either way – this is part of ensuring that Carpeo and its staff adhere to the guidelines of the FCA and achieve the best possible outcome for every potential RAC client.

When asked how Carpeo is different to other call centres, Stuart Aris responds "*Responsiveness. Transparency. Partnership. In it for the Long Term!*"

In terms of pricing, Carpeo again takes the long-term view. RAC's Stuart Aris was quick to point out that "*When RAC needed to set up the new Summer 2015 campaign within a week, it was business critical. Carpeo could easily have taken advantage of our commercial need and charged us a high price - but they didn't.*"

4.2.2 TRANSPARENCY IN INVOICING

While most costs are predictable, Carpeo is aware there is nearly always "feature-creep" in large projects, so in the interests of transparency and maintaining great client relationships, Carpeo uses robust project management and financial controls. This means there are no financial shocks for RAC. If and when goalposts move, new activities are costed and declared upfront.

Such strong project management is right at the heart of a good outsourcing relationship. It's a key driver of Carpeo's success across its 11 campaigns with household names and blue-chip companies. These robust

controls are what make Carpeo a stable AND scalable business.

4.3 EFFECTIVE INTEGRATION: MANAGEMENT INFORMATION FEEDS INTO RAC MARKETING

Our business insights can give feedback on trend analysis and even how good RAC's peak forecasting was; both by hour and category! However, Carpeo goes further than providing standard management information. Our capability is literally "industrial –strength!"

We stand out because we even provide feedback on a client's sales proposition. Although calls are not designed as a market research function, management information can spot trends and act like this in practice.

This is integration at its VERY best.

We summarise what certain customer segments are saying on calls; for example, lapsed members for 6 years say X, while lapsed members of 18 months say Y. This information is fed back into RAC's Marketing Team so they can develop better, tailored products and advertising campaigns. If the client takes full advantage of this two-way communication, they will feed it through to their PRODUCT development which underpins overall BUSINESS Development. **This approach defines Carpeo and makes it much more than just a Call Centre –**

Carpeo is actually a Business Growth Partner!

4.3.1 EFFECTIVE INTEGRATION: WE LIVE OUR CLIENTS' BRANDS

While Carpeo may be a small company, it has a blue-chip management ethos. It marries the passion and flexibility of a small company with the rigorous project management techniques usually found in much bigger organisations. This is the best of both worlds. We are big enough to work with such large blue chip clients but small enough to really care.

With every new campaign, we get the client's managers to come to Carpeo to train our teams (or we send our teams to their headquarters, as in the recent case of Thames Water). In this way, our people pick up subliminal messages and take pride in the brands they represent.

According to Carpeo's Contact Centre Manager Kerry Porter *"RAC's mentality is that 'The client comes first' so we've taken that to heart."* Kerry describes the passion in Carpeo as we represent client brands. She says *"Our people LIVE RAC's brand! We're passionate about what RAC means to the motorist and we take pride in bringing that to life in one phone call, because that sets the precedent for the customer's follow-on experience of RAC."*

RAC's Head of Sales and Service, Stuart Aris, summarises with *"Carpeo's performance and approach continues to be a key reason for us trusting so much of our business with them. They are fully collaborative and transparent- helping shape how we deliver campaigns as a result of their thoughts. During 2015 there were numerous times they supported the RAC at times of real capacity challenges and made sure they worked their utmost to ensure our members received a 1st class telephony experience."*

According to Carpeo Director David Williams *"It's an honour and a privilege to represent RAC, one of the UK's most trusted brands. We really work together as partners, openly sharing challenges, and working through to mutual benefit. RAC have really helped us reach the highest standards in Treating Customers Fairly, in return we feel like we've really helped them maximise their growth through sales expertise, insight and operational flexibility. We feel like an extension of their business. Adding RAC into our portfolio has fired our growth and opened up the financial services marketplace. It really is a growth partnership all round."*

Regarding integration, Carpeo Operations Director Suzanne Avent has gained an overview of the industry through working with over 100 call centres. She says *"Carpeo is really is flexible and responsive. We do what needs to be done. We take a long-term view of our business. In all we do, we seek to preserve excellent working relationships with clients to ensure smooth operations and guarantee long-term, mutually beneficial"*

growth. We are able to be completely responsive and the culture and attitude drives that through every interaction with customers and clients. The customer really does come first here. We say it but we really mean it!"

5. CONCLUSION

RAC's Head of Sales & Service Stuart Aris adds **"This is genuinely a two-way relationship. It isn't supplier-led. Our relationship with Carpeo is much more of a joint partnership. Our goals are your goals. Simple."**

David Williams is a quiet man whose leadership inspires great commitment among senior staff who make personal sacrifices to get the job done. This isn't just a one-off exercise though. The "Can-Do" attitude permeates Carpeo's culture. For example, in December 2015 a similar "fast-track campaign" with 28 agents was set up in just 72 hours (3 days) including recruitment **AND** training! This was for ARGOS' Division Home Retail Group. Again, it was David Williams who took the initial call from the client and set Carpeo's rapid response in motion.

In view of RAC speaking so highly of Carpeo, we believe we would make a worthy award-winner for **Outsourced Contact Centre of the Year 2015/2016**. Whilst a great long-term working relationship with RAC is already the highest reward we could wish for, an award from SWCCF would give peer recognition to our teams who work so very hard **every day, to make every contact even better!**

Return completed entries: By email: info@swccf.co.uk By post: South West Contact Centre Awards 2016, 13 Bradenham Place, Penarth CF64 2AG