



Pioneers of *Effortless* Learning & Development

Case Study



About our client

A leading UK mortgage servicing organisation

The Brief

With the arrival of the new Mortgage Market Review regulations, the client had identified a need to make a series of changes to their existing business model.

The MMR requirements meant organisations needed to implement more stringent checks to their mortgage applications and reviews. For this client it meant adopting a more consistent, robust and effective approach towards managing existing mortgage accounts. A new Training and Competence scheme had been produced outlining how the business would comply with the various rules and achieve competence.

In discussions it was agreed that an additional layer of support was required along with a review and overhaul of the conversations that contact centre staff were having with customers. It was also agreed that the recruitment and training of a team of T&C supervisors was crucial to the overall success of the approach being adopted. This along with the creation of new compliant servicing scripts and review standards would ensure that the business would meet the regulatory requirements, its servicing standards and goals, and continue to treat its customers fairly.

The Process

Working closely with our client and their T&C manager it was agreed to design a comprehensive induction training programme for the new T&C Supervisors. The programme was to focus on developing the key skills required to operate as a supervisor within the T&C scheme and to assess each one as competent in the role.

A programme was proposed for the T&C supervisory team to participate in a bespoke modular learning event. Additional work was undertaken to create a new set of compliant call scripts and audio role-plays designed to meet the requirements of MMR and the needs of the business. These call scripts were used to train the contact centre teams in their new roles. The audio role-play calls were used to assess the understanding of both the contact centre and supervisory teams. Evaluating the new skills and understanding of the contact centre and supervisor team members provided a benchmark for the client it also created an audit trail for future development.

A number of workshops were delivered over a period of weeks allowing for coaching follow-up to take part between modules to ensure the transfer of learning had taken part and skills were utilised within the job role. All new T&C supervisors achieved satisfactory competence and were signed off as competent to undertake their roles.

The Results

Having completed the T&C supervisor workshop, the new supervisors were able to provide the necessary guidance, support and coaching required for the business to comply with the new MMR requirements and to continue to provide its services to its customers. All designed and delivered on time and within budget.