

FINANCIAL SERVICES:

FORTUNE 200 REPORTING ANALYTICS

- DESIRED CAPABILITIES:
- Business Alignment
 - Value Sizing
 - Minimum Viable Product Pilot

THE SITUATION

A contact center within a Fortune 200 financial services company needed help. Its leadership team wasn't confident that current reporting systems or forward-facing data infrastructure projects were aligned with primary business objectives. Looking to determine the validity of existing reporting processes and improve metric selection, they turned to Spinnaker.

THE CHALLENGE

Within three months, calculate the tangible value of potential reporting enhancement initiatives and pilot a working solution in the business.

OUR RESULTS

- Identified \$6 million in annual value by eliminating duplicative reports and simplifying operations
- Created organizational engagement and alignment – from the more than two dozen stakeholders as well as an impassioned segment of operations managers – on a reporting system focused on core business goals
- Improved prioritization and alignment of data infrastructure by:
 - Eliminating 75% of the original reporting structure
 - Honing in on the right metrics – a third of what had been previously measured – and encompassing all current communication channels
 - Centralizing reporting to enable faster business results



OUR APPROACH

We began with an extensive research effort, interviewing dozens of stakeholders—including analysts, front-line managers, and leaders—and inventorying the existing reporting suite to better understand business function and impact.

We then leveraged that information to identify a segment of the contact center whose narrow scope would enable a holistic reporting redesign. We found an ideal candidate in the organization's Chat Operations function.

Next, we led several half-day sessions across the organization with representatives from Operations, Reporting, Decision Science, Administration, Forecasting, Capacity Management, Vendor Relations, and Information Governance to understand each unit's business needs and ground preliminary reporting and metric recommendations across nine discrete functions.

With that insight and information, we designed a reporting suite aligned with primary business objectives and focused on driving business results.

BUILD A REPORTING SYSTEM THAT DRIVES YOUR BUSINESS GOALS.

[Download](#) our *Data Analytics Playbook* for a guide to more informed decision-making.



FEATURED CONSULTANTS:

Micah Dalton,
Advisor

Hanna Turner,
Advisor