

# Chartered Banker

Leading financial professionalism

## CALL CENTRE MANAGEMENT

### Assignment 1

The Chartered Institute of Bankers in Scotland, Drumsheugh House, 38b Drumsheugh Gardens, Edinburgh, EH3 7SW

Telephone: 0131 473 7777      Email: [info@ciobs.org.uk](mailto:info@ciobs.org.uk)      Web: [www.charteredbanker.com](http://www.charteredbanker.com)

Charitable Body: The Chartered Institute of Bankers in Scotland (CIOBS) – Reg No.: SC013927



## Important Assignment Information

### ASSIGNMENT LENGTH

For assignments submitted on or after **1st September 2008**, there is a **maximum** word count of **2,500 words**.

From that date, if you fail to adhere to the maximum word count, a deduction will be made to your final assignment mark. Specifically, if you exceed the 2,500 limit, you will be deducted **1%** for every **100** words or **part** of **100** words over the limit.

For example, if you write a total of **2,614** words, a **2%** deduction will be made to your mark. For clarification, the word count includes all references and attached appendices.

### PASS COMPENSATION AWARD

In recognition of the importance attached to the assignments, an award of **Pass Compensation** will be made to you if you score between 45% and 54% in the final exam and if you complete the required assignment(s) under the following conditions:

1. The assignment mark must be 60% or above – where two assignments are required, then the average mark must be 60% or above **and**
2. Assignments must be in the hands of the Tutor **at least** one month prior to the **chosen examination date for each subject**.

For example, if you enrol to sit a **full** credit subject examination on **15<sup>th</sup> December**, you must have sent **both** assignments to your tutor by **15<sup>th</sup> November**.

Similarly, if you enrol to sit a **half** credit subject examination on **2<sup>nd</sup> March**, you must have sent the **sole** assignment to the tutor by **2<sup>nd</sup> February**.

Please also note the following:

- (a) Where an assignment is marked at less than 60%, this may show up as **'Fail'** in the web-based student record – this is purely with reference to the Pass Compensation award and does not necessarily mean it is a sub-standard submission
- (b) You are **not** permitted to **re-submit** an assignment in order to gain a higher mark
- (c) In the event that you fail an exam and have not completed the required assignment(s), you can subsequently complete the required assignment(s) – these will then count towards any re-sit examination undertaken. Submission dates for these assignments must comply with the relevant timescales as stated in **2** above.

## Case Study

**Read the following Case Study and follow the answer guidelines.**

**You are not asked to answer specific questions, but are invited to produce your answer in the form of a proposal or report, with logical, structured headings of key issues.**

You are the Operations Manager of a 50 seat call centre of a retail bank.

You have overall responsibility for four teams, although day to day activities of each are managed by a team leader. Three of your agent teams handle routine inbound calls from current account customers about account balances, statement requests, arranging standing orders and direct debit mandates. The fourth team handles inbound calls from prospective personal loan customers, in response to the following marketing activities:

- Advertisements
- Direct mail
- Information on your company's website
- Point of sale material available on display at bank branches.

Last week, you were asked to attend a meeting with senior management. At that meeting, management revealed its strategic plans and the future direction for your call centre.

Senior management has identified that from all enquiries about personal loan facilities, which arrive at your call centre, only 10% result in business. Having analysed competitor activity, it has been found that when initial enquiries about personal loans are followed up with a sales call, 40% result in business.

Management are therefore proposing the following strategy for increasing business from personal loans:

1. Redeploying twelve of your existing inbound current account call handling agents to making outbound follow-up calls for personal loans
2. Recruiting an additional six full time outbound calling agents.

Senior management has asked you to come up with a proposal for implementing this strategy, with a target date for having the existing inbound agents retrained and the additional six new agents in place within three months.

In your proposal, you have been asked to consider any limitations or potential problems, which could arise. Management is also giving you the autonomy to work with the marketing department and to manage all agent recruitment issues.

**In your answer, consider the following:**

- The implications and impact on your human and technological resources
- The structure of your future teams, and any HR issues which might arise from the changes – also include in detail your recruitment strategy
- The relationship with the marketing unit – how is this going to change?
- From what external sources or contacts might you gather some research information?

**TOTAL ASSIGNMENT MARKS – 100**