

Case Study – The People Analytics Co. Ltd.

Round 1 – Case Background

About The People Analytics Co. Ltd.

The People Analytics Co. Ltd. (PA) is a data and analytics company that provides services to organizations to help them manage and track data related to Human Resources. The company provides detailed reports and information to companies on key parameters related to hiring, performance management, and training and employee expenses.

The company acts as a KPO to its clients and takes over all HR related data, processes them and provides reports and dashboards to the client HR teams on a monthly basis. These reports and dashboards are used for decision making by the client organization.

The internal structure of PA is based on the concept of Key Account Management. Each client, based on its size and requirements, is assigned a team that manages all aspects of the account.

Usually, each team is headed by a Team Manager, who has a number of Analysts reporting to the Team Manager. The Team Manager reports to the Key Accounts Manager, who has several such teams reporting into that position. The team size depends on the size of the account.

The number and type of reports are fixed at the beginning of the contract period. Data is drawn from the HR systems directly on specific dates and reports are presented on the 25th of each month.

Your Role – Team Manager for A&M Capital

You are the Team Manager for the team that is handling the account for A&M Capital, a very large Financial Investments firm with operations across different business entities in 15 countries. These business entities are spread out across the globe. A&M Capital sells financial products in the retail and corporate segments. Their product range spans across Asset Management, Insurance, Personal Loans, Consumer Durable Loans, and Credit Insurance.

The company is growing at a very fast pace and has reached a turnover of Euro 2,500 million. It has over 5000 employees worldwide. All its entities are wholly owned subsidiaries, and they report to the regional Head Office, which reports to the Head Office in London, UK.

PA has a global contract with A&M Capital and provides services to all the 15 business entities across the world.

You have a team of 10 people who work on different business entities of A&M Capital that have been mapped to them. The reports are, usually, shared in the form of an Excel based dashboard.

The team has the following tasks and SLAs:

1. Draw data from the HR system at a regular basis.
2. Follow-up with key stakeholders on additional data and information particularly for the manual processes.
3. Process the data and create first cut reports by the 15th of every month.
4. Have interaction with key stakeholders for modifications or additions in reports. These interactions are, usually, done over conference calls.
5. Create final reports between 25th and 30th of the month and receive sign-off from the client on the reports.
6. Compile regional and country wise data and report to Head Office once every quarter.

At the beginning of the contract period, the reports that are required for each business unit were decided and finalized. Some of the reports are simple and straight forward while others require gathering data from multiple sources that may not be all available readily and online.

The team has been meeting most of its SLAs. Sometimes there are a few reports that are not delivered within the stipulated 25th – 30th time period and are then sent in the next month's cycle. Such events have occurred less than 2% times in the past six months. The data accuracy audits have received a quality score of +95 which is in the Good – Very Good range.

The team receives an audit and QC feedback sheet on the KPIs once every month.

The team has been enjoying their work, and there is a great degree of collaboration and commitment displayed by the team in managing the client.

Based on your understanding of this short background, answer the following questions:

1. What do you feel should be the KPIs for this team?
2. Do you think A&M capital is happy with the services provided to them by PA?

Round 2 – Team Meeting

You have been working on this account for over six months now. You receive a call from your Key Account Manager, Kapil for a team meeting. He says he wants to share the feedback from A&M Capital. You assemble the whole team in the conference room, and Kapil begins his discussion.

“Guys, A&M Capital is unhappy with our services. I received a call from them last evening, and they informed me that if things do not improve within the next month, they will pull out of the contract. This is a very important client, and we cannot afford to lose this client,” Kapil exclaimed.

All of you are stunned by this feedback and are at a loss of words. “But we have never received a poor feedback on any of the KPIs. I don’t know where this is coming from. The audit reports have been good, and we received a Good-Very Good feedback on SLAs,” you say confidently.

Kapil asks everyone, “I know the data accuracy audits have been. Still, why do you think that the client is unhappy?”

Sarah is quick to state that the feedback may be due to the reports that got delayed last month. However, she is quick to point out that the delays were due to the client sending the information late despite many follow-ups.

Manish points out that the he has been facing delays in receiving data from 2 entities that he works with which has caused delays in sending out reports.

Savita and Mohsin both point out that most delays are at the client’s end, and they have also been receiving poor and duplicate data from their business units.

Soon everyone starts pointing out the mistakes the client has been making. “I think the SLAs are not realistic. How can we meet the dates when the client delays sending information every time? In fact, I find Steve (the HR SPOC for a business unit) from the France team extremely rude. He is never happy. I just don’t know how we can make this client happy!” Suraj points out.

“In spite of this, we have been maintaining very high data accuracy and have been sending reports on time. I was hoping to receive a very good feedback from the client.” Says Sonal.

The environment in the room soon gets very negative, and there is general dismay and disbelief about the feedback. That is when you ask, “Kapil, what did they tell you are the main areas of concerns?”

Based on your understanding of this short background, answer the following questions:

- What do you think may be the problem?
- Why do you think the customer is unhappy although the reports suggest otherwise?
- Has a similar situation (even if at a smaller scale) ever happened in your organisation?

Round 3 – Detailed Client Feedback

Having heard everyone's point of view, Kapil launched a PowerPoint presentation with feedback points received from the client. The feedback was provided by 5 different individuals from across the business units. The feedback is provided here:

1. The team is too **transactional** and is only bothered about completing the reports on time and ensuring that their deadlines are met. We do not feel that we work with an extended team which is helping us solve our business problems.
2. We get the standard reports every month, which are on time. However, there is hardly any value add.
3. The reports are standard and very good. But, we are looking for more. The first few months, the reports were great, but nothing new is coming.
4. I once asked if a report could be modified slightly and I was told that this will need additional time. I never heard back from the team! The regular reports come on time and are perfect. I can't blame them; they seem to have a lot on their plate already.
5. I like working with the team. They are prompt and respond on time. However, there could be a little more personal touch and warmth.

As soon as the feedback was shared, everyone had a very confused look on their faces. "If we are meeting all timelines and delivering everything as per the SLA, where is the problem? I still don't understand this!" Savita remarks.

Based on your understanding of this short background, answer the following questions:

- What is your understanding of the situation that this team is facing?
- What are the areas you would immediately like to address?
- Has a similar situation (even if at a smaller scale) ever happened in your organisation?
- How should this team solve this situation and win back the client?