# *Case Study* – Private equity owned shared services function

## Situation

Our client is a shared service function, providing a range of back-office services to a group of private equity owned businesses. Despite being initially established as a back-office function, their clients treat them as a third-party supplier, with increasingly demanding expectations of customer service, combined with sensible commercial pricing. Therefore, no longer can they assume that clients will remain loyal, simply as a result of organisational affiliations.

## Requirement

Gain objective insight from the client-base as to the current levels of loyalty. Provide the means to identify the key loyalty drivers and areas that will reduce the effort required when dealing with the shared service centre.

## Approach

Initially, time was invested in ensuring that the management team were introduced to the principles and benefits of Net Promoter Score* (NPS) and the additional value if this were combined with Net Effort Score (NES). The decision was taken to adopt a combined approach.

An NPS & NES roadmap was designed and reviewed with the team. This outlined how to get immediate traction and future enhancements that could be implemented as maturity grew and it became embedded with the organisation and their clients. Target recipients were identified in conjunction with designing the layout and developing internal & external messaging. Simple analysis techniques were shared with the Business Intelligence team prior to the rollout of the initial assessment.

## Outcomes:

- Loyalty levels were higher than anticipated (+35 points between actual and assumed)
- Effort levels were lower than expected – several keys areas were identified for immediate action
- A 90-day improvement plan was introduced with the assessment used to validate effective positive change

## Support provided

- Net Promoter Score* design & implementation
- Net Effort Score design & implementations
- Data analysis support

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