

Case study: Lead Provider Framework

Customer Account Management Processes

NHS Arden & GEM Commissioning Support Unit (CSU) is one of the largest CSUs in the country, providing commissioning support services to more than 50 Clinical Commissioning Groups, NHS England, NHS provider trusts, STPs and local authorities.

To ensure Arden & GEM provides the very best service to its customers, we carried out a thorough review of our approach to customer account management. This has led to the development of a robust system, with improved processes, consistent and timely reporting, delivering enhanced customer relationships as a result.

The challenge

While commissioning organisations are ultimately working towards the same goal of delivering better outcomes for patients, each customer has unique support requirements. Priorities differ depending on a complex web of factors and the specific health needs of their local populations.

Arden & GEM provides a wide range of commissioning support services to customers, from service transformation, informatics and continuing healthcare, to corporate functions such as finance and human resources. Working within such a complex environment and across diverse service and geographic areas could result in account management and reporting becoming fragmented and reactive, and risk duplicating effort.

Our challenge was to develop a coordinated approach which would provide clear and consistent customer account management processes across our entire portfolio of services, while being able to tailor services to suit local needs.

Developing a solution

Our aim was to deliver higher levels of customer satisfaction by improving the customer account



management processes. This included improving communication and processes, eliminating waste and reducing duplication of work. The main objectives were:

- Delivering a robust, reliable service to internal and external stakeholders
- Collecting and collating all information on a timely basis
- Reporting the progress on agreed timescales
- Escalating arising risks/issues quickly and appropriately to mitigate impact

We began by mapping our processes, using lean methodology principles, to identify and implement opportunities to maximise efficiency and productivity. As a result, we have improved processes and strengthened the management of customer accounts, including providing regularly updated Customer Account Plans, Customer Satisfaction Scores, Risk/Issue Registers and Key Performance Indicator reports. A cloud based system was selected to provide easy access for both employees and customers.

Information is provided regularly in a number of formats to help improve management and delivery of services. This includes highly visual dashboards which give an overview of metrics and performance.

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Dashboards and risk/issue reporting is produced on a monthly basis, with regular reviews completed by the senior management team to provide both visibility and accountability. Information contained within customer account plans also delivers a clear audit trail, succession planning and a reliable source of information that enables a 'single version of the truth'.

From the outset, we were clear that effective customer account management not only requires robust processes but clear lines of communication between Arden & GEM and its customers. In addition to the development of our customer account management processes, we have also appointed Service Delivery Directors (SDDs) who provide a vital interface between internal services and external customers. SDDs provide a key point of contact with local knowledge and expertise, which allows us to provide an enhanced service to customers. Account management processes play a pivotal role in enabling SDDs to monitor and deliver customer objectives – ensuring we achieve the highest possible levels of customer satisfaction.

The outcomes

Our approach to customer account management has ensured we have a robust system in place to meet customer expectations, ensuring we deliver against Service Level Agreements. Processes are more efficient, duplication of work has been reduced and we are ensuring that outputs are fit for purpose and fully meet the needs of our stakeholders.

Updated customer account plans provide quantitative and qualitative metrics to help inform strategic decisions. Plus, relationships have been improved through a more proactive approach to key account management. Internally, the approach has also resulted in greater awareness of the importance of customer satisfaction scores.

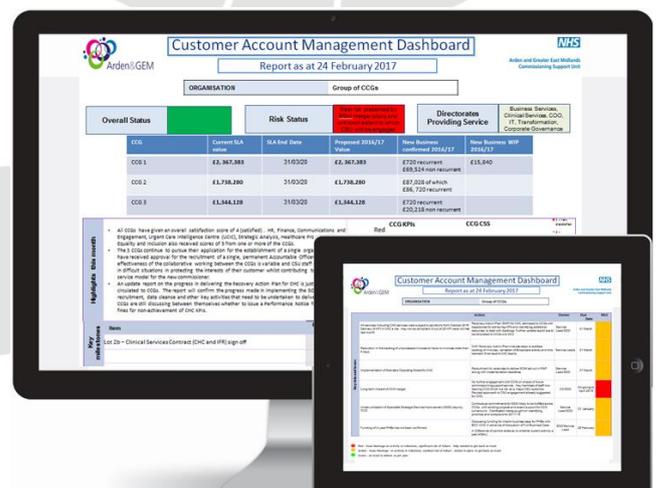
Our Customer Account Management function has recently been audited as part of our successful ISO 9001 accreditation, which demonstrates we are working to standards and procedures that provide a high standard of customer service.

The service has also been praised by independent consultants, Deloitte, through an assurance audit of our internal controls.

“Developing our customer account management processes required a collaborative approach involving a wide range of stakeholders. Our approach has delivered an integrated solution that has been pivotal in increasing customer satisfaction scores.”

Noureen Wasique, Client Business Partner

The processes we have in place have helped Arden & GEM to better understand customer opinion and to deliver a more effective service. With a more consistent approach to customer account management, we are seeing overall improvements to customer satisfaction levels. We continue to build on this work to ensure our services meet the needs of our customers and that we are able to easily adapt in line with evolving customer requirements.



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