

Sue Elliott - Profile and Experience

STRENGTHS

Management Consulting

Is a Certified Management Consultant, (CMC), the highest level of accreditation from the Institute of Management Consultants. Worked as senior consultant for top tier consulting firm KPMG from 1997 and then on international assignments for a specialist international technology consulting firm. Set up own consulting business in 2005.

Skilled at stakeholder interviews, workshop facilitation, and writing assessments, reports and reviews. Assignments typically include: information gathering, analysis, documenting current state, creating a vision and developing future state design, developing recommendations and roadmaps, building plans and identifying success measures. Able to form effective working relationships at all levels of the organisation. Comfortable working with CEO and executive teams.



Change management and large transformation projects

First involved in a major transformation project in 1990. Has worked on multiple transformation projects, set-ups and mergers across USA, UK, Asia and NZ. All successful.

Recently held a number of senior change management roles on large national programmes (public and private sector).

Is a PRINCE2 registered practitioner and is an experienced change manager (working with Prosci / ADKAR since 1998 in the USA). Experienced in process design and improvement.

Service design, call centres, customer experience

An area of technical expertise and passion for Sue is the customer facing areas of business. This has been a constant through her career and she is regarded as an expert in this area.

QUALIFICATIONS

PROFESSIONAL	ACADEMIC
Certified Management Consultant (CMC) (2013) - The highest level of accreditation from the Institute of Management Consultants.	Master of Business Administration (MBA) - 1992 Bradford University UK Winner of 3i Prize
PRINCE2 Project Management Practitioner (2012)	Postgraduate C.I.M. Diploma in Marketing
SSC Gateway Reviewer for large Govt Projects (2011)	Postgraduate Diploma in Management Studies (Distinction)
Certified Internet Webmaster (CIW) Professional	B.A. (Joint Hons) in French and Italian
Full member of IMCNZ	Lvl 4 (advanced) Nat. Dip. in Horticulture

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Employment Summary

WHEN AND WHERE	ROLE DETAIL
<p>Since March 2005</p> <p>Director and Lead Consultant at Customer Service Design Ltd.</p> <p>Self-employed.</p>	<p>Working with all types of businesses to improve the service experience they deliver to their customers or internal stakeholders.</p> <p>Projects often begin with a general service review then focus in on the biggest opportunities.</p> <p>Projects have also included a number of senior change management roles.</p> <p>More detail is provided later on some of these projects</p>
<p>1998 – 2005</p> <p>Vanguard Communications. Senior Consultant (and Managed Asia Pacific Office)</p>	<p>Working mainly on USA projects for a specialist technology consultancy, I was the “people and operations” lead on multiple contact centre design and improvement projects. I stayed in the USA for months at a time and led teams of work on strategy, process design, change management, organisational design and performance measurement.</p>
<p>1997 – 1998</p> <p>KPMG Management Consulting, New Zealand. Senior Consultant.</p>	<p>Brought over from the UK for my call centre expertise, I led a number of NZ call centre projects in the banking, energy and government sectors.</p>
<p>1992 – 1997</p> <p>The Co-operative Bank, UK. Manager of Phone Banking, then Programme Manager (for expansion).</p>	<p>I had two roles with the Bank. I was initially employed as manager of phone banking. This was the start of telephone banking in the UK. I managed this department from a pilot of 16 staff to over 400. On a part-time basis I also project managed the development of a funds transfer system.</p> <p>I then moved into a programme management role where I managed the development of a second site for the Bank’s telephone banking service. This project had a budget equivalent to more than NZ \$50 million and very aggressive time frames. The project began with a capacity planning exercise, feeding from the corporate plan yet visioning changes in customer contact channels over the next five years. The project included the selection and fit out of the site, the selection and implementation of new technology, the selection and training of 200 new-to-bank staff, the development and implementation of multi-site business processes. I was accountable for the whole programme and provided regular updates to the sponsor, the steering group and the Board.</p>

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WHEN AND WHERE	ROLE DETAIL
<p>1990 – 1991</p> <p>Marks and Spencer Homechoice (Mail Order Business). Project manager for set up then Administration and Customer Services Manager.</p>	<p>Marks and Spencer is a leading UK retailer. Virtually every town in the UK has a store.</p> <p>I was responsible for developing the admin and finance processes and system requirements for the new mail order business. These needed to be specifically designed because in a retail store goods and payments generally exchange at the same time, whereas in a mail order situation the timing is different. Stock control systems, accounting systems and cash reconciliations are all impacted. I did the designs and then tested them with accountants at head office. Once the team was sure they had covered all eventualities and scenarios they selected an IT provider to make the changes to the central systems to accommodate the new business, and integrate with the new customer ordering system. Once the operation was live I managed the admin and Finance team (c 32 pax) at the site. This also included responsibility for a multi-user warehouse supplying stock to stores.</p>
<p>1984 – 1990</p> <p>Marks and Spencer, Admin and Finance Manager of various stores.</p>	<p>I joined M&S as an Admin and Finance management trainee, and progressed to managing the admin and finance teams at various stores. I progressed rapidly to larger and larger stores. Eventually I had two stores (approx. 14 staff across 2 towns) to manage at the same time.</p>
<p>1983 – 1984</p> <p>Hazlewood Foods, UK. Production Management Trainee</p>	<p>Hazlewood's ran Europe's largest pickle manufacturing plant in Selby. I started my career with them as a management trainee. I learnt how to plan and schedule production, negotiate and procure supplies for production, and to manage plant and people on a production line.</p>

Sector experience summary

• Banking and finance	• Energy
• Retail	• Public sector (local)
• Professional services	• Public sector (central)
• Training / Education	• Small businesses
• Telecommunications	• Health Insurance

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Consulting project descriptions and achievements (examples only, not a full list)

Feb and March 2015 – Ministry of Primary Industries

Consulting assignment in the Legal Services area to review a stalled project. Goal was to make recommendations on if/ how the project should progress. I met with stakeholders, analysed existing information and presented a number of options and frameworks to move the project forward. These were tested with the sponsor and key stakeholders then presented in a report. The MPI team felt the brief had been met and they had a way forward.

Sept 2013 - Nov 2014 - Ministry of Education

Contracted as Senior Change Manager on the Managed Network Implementation project for schools. The project was coordinating the connection of schools to the Ultra-Fast Broadband Network. I came in late to an established project to kick start change activities. A succession of other change managers had not succeeded and the roll-out was beginning shortly after I arrived.

Establishing regular meetings I worked across a new start-up organisation (N4L) and Ministry of Education to develop a joint change plan. I co-ordinated and procured resources to develop communications, training and processes and procedures to support the change. Key artefacts developed included a website based support pack for schools, new processes, and a series of webinars. Feedback and take-up of these resources indicated that most schools felt well supported for the change.

I then moved on to a wider Senior Change Manager on the Learning with Digital Technologies Programme. This was an enterprise change programme to support 'digital' learning in both the sector and Ministry. Responsibilities included leading the communications and change team, developing change and engagement plans to cover all programme initiatives; Performing change impact assessments, transition planning and project and vendor management.

As I left a Treasury 'Gateway review' of the overall initiative resulted in an 'Amber' status – a notable achievement and improvement from successive years of Red status (project should not continue). This reduction was largely due to the improved change management status of the programme.

2013 - MirrorWave

Consulting assignment. Worked for a few months with this young and rapidly growing company to take their change management and project management from good to great. This involved reviewing current processes, interviewing staff and customers, running workshops and coaching sessions, selecting project management software and designing new project and change processes. The changes have been successful, Mirrorwave staff and their customers now spend less time on administration but feel better informed.

2012-2013 - Contact Energy

Contracted as Change Manager, SAP Retail Transformation Programme. Led the change management planning for the customer facing areas of the business (call centres and web services).

- Conducted a stakeholder analysis
- Developed a Change Engagement Plan and Approach
- Planned and led a culture change session at an offsite workshop for the change and readiness team
- Led the development of the Change Impact Approach

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- Worked with the Process Improvement team, to draw out and validate bottom-up Change Impacts
- Worked with business reps and functional consultants to collate and then rate top-down change impacts
- Developed relationships with senior leaders in the business. Delivered change messages and change coaching to business stakeholder groups.
- Worked closely with the company's Business Readiness Managers and other change managers.
- Feedback from the key business owner on my contribution was very positive.

As the programme go-live date was then significantly delayed I was not there for launch.

2012 - National Library

Short consulting assignment to write a strategic review of a service provided to public libraries. After interviews, analysis and workshops I delivered a comprehensive report. The review also identified some new opportunities and many synergies with the government's service transformation plans and goals such as Result 10. My recommendations were built into the next financial year's business plans.

2012 - The Parliamentary Service

Consulting assignment to review of a key service area and identify opportunities for improvement. SMT endorsed the new high level design and I went on to document the next level of detail and write the project initiation document. The project then progressed with a dedicated project and change manager.

Note: this was the second project I had done for this client

2011-2012 - Woolworths Everyday Money (at Salmat)

At short notice I project managed a call centre set up (including recruitment) over a very aggressive timeframe (6 weeks including Xmas and New Year). Project was delivered to scope and went live on time.

2011 - Inland Revenue Department (IRD)

Consulting role. Worked on a 6 week programme review for an "out of control" systems replacement project. Presented options for getting back on track (one of which was selected). Also put in place some reporting and controls for the Transformation PMO.

2005 -2006 - Ministry of Justice (MOJ).

Consulting assignment. As part of a transformation programme I developed a customer contact strategy for the Ministry. It covered all customer types and all jurisdictions. The project started with a "current state" assessment gathering data and observations to get information on customer types, the channels they used to interact with MOJ, and the various customer touch-points that existed across the business. This was followed with a "future state" design and a pathway of suggested projects. The detailed deliverable also showed how new technologies and innovations successful elsewhere could apply to their business. The report made concrete recommendations and presented a strategy and proposed work plan.

- Executive team had better awareness of customer types, interactions, business issues and current performance.
- They also gained an understanding of "good practice and emerging trends".
- They had a plan of work that would deliver cost savings, efficiencies, quicker access to Justice, and choices and improved services for customers.

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Christchurch City Council - total of three projects over 4 years. This is just one example

Consulting work to develop a customer contact strategy and technology roadmap. Brought in by the manager of customer services who was frustrated that the business was not working together to a common goal and that customer contact experiences were vastly different across many areas of council.

- The workshops showed them what was possible and drew out from the various team members what was getting in the way of them agreeing a common way forward. One key issue was identified as roadblock; the lack of a technology strategy within the council. I pulled in expert help so we could produce a technology roadmap (for customer contact) that would not compromise future flexibility across Council and the new CIO was happy to endorse this. In fact it became a key component of his new business-wide technology strategy.
- The workshops led to a blueprint design for future customer services. This was adopted and implemented. The new model improved service levels, at no increased operating costs, and freed up staff to handle more specialist enquiries.
- There is less rework, and fewer repeated calls. Customers are not “bounced around” and more queries are resolved at first point of contact. The volume of customer service complaints also decreased in the first year of the new model.

Far North District Council (FNDC) – total of three projects over 3 years. This is just one example

Service assessment which then led to strategy development work. I was initially asked to carry out an assessment of customer service across council. This identified a number of opportunities including some at a strategic level. I then worked with them to develop an updated customer service strategy. This began by understanding contact types and customer types and volumes, then benchmarking FNDC’s service against other councils and good practice in public sector service delivery, then identifying key findings and opportunities. I then led a series of workshops with the executive team to define the new strategy, timeline and set priorities. Together with an internal team I worked on some process improvements and scoping a number of projects.

These were then divided into quick wins and mid or longer term. I helped deliver a number of the quick wins and documented the service delivery model for the CEO. Key benefits were:

- A documented vision and shared understanding of customer service goals
- A clear plan for improvement projects
- Less delays and no duplication in the redesigned processes, saving costs and improving customer responsiveness.

EXAMPLES PRE 2005

Virgin Mobile Singapore

Worked as part of the design team to set up this business in Singapore. Engaged as an expert to project manage the design and documentation of the processes and associated training for the retail and call centre areas of the business. This included front and back office processes such as:

- Processing sales orders
- Processing top up vouchers
- Customer set up
- Lost and stolen products
- Store order, receive and return stock

Results

- The business went live as planned and there were no glitches in any of these

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process areas. Changes in regulation later affected the competitive environment, and Virgin withdrew from Singapore a year later. The same business model has been applied elsewhere though and the processes I developed were used as a foundation for the next location (tweaked to meet local needs of course).

ABN AMRO Direct Banking (USA).

Direct Banking had grown significantly in a short period of time via mergers and acquisitions and organic customer growth. ABN AMRO wanted to put a program in place to enhance the customer experience. They identified four key projects which I scoped, led and delivered through to the design phases:

- Planning training to provide supervisors with tools and techniques to better coach and mentor the front-line staff.
- Reviewing measurements, incentives and recognition programs to ensure that customer focus is “baked into” the system.
- Deploying a new technology (customer data driven skills based routing) to ensure that the customer gets to the most appropriately skilled agent.
- Enhancing quality monitoring processes to focus on serving the customer with a positive, friendly tone, as well as handling the contact in an efficient manner.

Results

- All analysis and design projects were completed and signed off by the sponsor. The work was then handed over to internal project managers for delivery. All projects were successful and contributed to enhancing the customer experience.

The Healthcare Group (THCG) (A US Health Insurer)

THCG acquired another business and wanted to merge the two operations and customer bases. Vanguard was engaged to do this work. I led the Process and Organisational design workstreams. This included, designing processes and training, identifying functional and system requirements, redesigning roles and identifying key business metrics.

Results

- The call centre merger happened as planned with no negative impact to customer service (see testimonial later)

IRD NZ

The new call centre for business customers. Vanguard had won the contract to lead the design work for the Process and Technology elements of this new call centre. I worked with internal teams and external vendors to get the designs right. At the time this was the largest most advanced call centre in New Zealand.

Results

- The project put in place technologies not used before in New Zealand. This resulted in better access to services and huge reductions in staff costs.
- The call centre became a showcase for the call centre industry and even now is regarded as leading class in terms of design and technology.

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Sample Testimonials from consulting clients:

“Sue brings a structured and methodical approach to information gathering and is able to clearly present facts and recommended solutions..... her expertise clearly assisted in the recommendations for improvement being accepted. I appreciate how Sue kept me informed on progress and....would not hesitate to recommend Sue” **Anne Smith, Group Manager, The Parliamentary Service**

“Sue was very conscious of reducing our costs where possible. She used the time in our organisation very efficiently and completed within the timeframe. She was very perceptive and encouraging about where our organisation could improve our performance.... Sue represented excellent value for money, and was worth more” **Jan Gerritsen, Masterton District Council**

“Sue delivered great results, she interacted well with people and her rate represented great value for money... Sue knows the call centre and customer service business very well and over several years has provided a range of recommendations for improving our service” **Helen Glasgow, CEO Quit Group**

“Just a note to say Thanks for all your assistance these last few months. I learned a lot about call centres, but also about “best practices” of a consultant. You were great.” **Rosemarie Byrd, VP at THCG USA**

“Sue had a very good understanding of what we were trying to achieve and quickly grasped the particular nuances of the business.... Sue brought to the table what she said she would and delivered as promised, on time with no exceptions.... It was Sue’s technical skills and experience that we were looking for. Sue was able to provide insights, advice and decision making that removed much of the risk that was evident prior to her arrival”. **Simon Bailey, BCITO**

“We found Sue’s work to be of the highest standard. She was dedicated and committed to delivering work that would mean something for FNDC now and in the future... The key benefits of Sue’s work.... were building a platform from which FNDC could leverage off in terms of improved customer service – enabling change from a business function focus to an organisation that focused its services around the customer, putting the customer first.” **Clive Manley, CEO FNDC**

“The assessment centres were the best we’ve had (thanks to you).We have 12 people we would like to make offers to. On this basis we are looking good for an earlier induction date” **Rob Kingston, Salmat (Woolworths Everyday Money)**

“Thanks for your work. We enjoyed having you with us at MPI” **Connie Toia**