

CASE STUDY

The journey to an optimised, connected and compliant contact centre

Customer: Bendigo and Adelaide Bank

Location: Australia

Industry: Banking & Finance

Bendigo and Adelaide Bank engaged nimbus to implement a modern workforce optimisation solution that would provide a centralised platform to automate and optimise workforce processes. nimbus Connect was deployed for over 230 contact centre agents across its Australian locations.

At a glance

Challenge

- Outdated legacy system was reaching end-of-life
- Limited integrations with HCM and payroll systems meant manual intervention was often required
- Lack of data and reporting functionality reduced operational visibility and impacted decision making
- Limited accurate time and attendance capture and communication with staff

The Business

Bendigo and Adelaide Bank is an Australian community-based retail bank providing a range of banking and financial products and services to retail customers and small to medium sized business. Bendigo and Adelaide Bank comprises of a national network of over 500 outlets that operate across Bendigo, Melbourne and Adelaide, comprising approximately 7,500 employees. Since 1858, its fundamental purpose has been to help customers and their communities to secure prosperous futures.

The Challenge

Bendigo and Adelaide Bank was using an outdated rostering tool, which was reaching end-of-life. Limited integrations with third-party payroll and HR applications meant that manual invention was often required to ensure accurate pay outcomes, creating complexity and impacting user experience. Reduced visibility of data and analytics also made it difficult to make insightful business decisions.

This led to Bendigo and Adelaide bank initiating a review of their human capital management processes. They went to market to find a people management solution with payroll integration that would streamline their workforce operation, provide insights and reporting, and ensure compliance confidence.

Solution

- Cloud-based WFO system with data hosted in Australian data centres
- Patent protected secure system access control for contact centre agents via ACD/Softphone integration
- Staff scheduling using AI-built smart technology reduces manual processes and intervention
- Award compliance is supported through seamless payroll integration and correct employee pay outcomes
- Forecasting of future call volumes ensures shifts are better planned for and managed

The Challenge continued...

Bendigo and Adelaide Bank's contact centre was an area of particular concern due to its hybrid and variable work patterns. The company sought more control over time capture of employee hours worked to help improve customer and employee satisfaction.

The Solution

nimbus was selected by Bendigo and Adelaide Bank in a competitive tender. Our wholistic one platform, multiple solution capabilities stood out in the marketplace and offered an interconnected solution with advanced workforce technology that met the operational and compliance needs of Bendigo and Adelaide Bank's on-site footprint and contact centre department.

In their first phase, Bendigo and Adelaide Bank engaged nimbus to implement the nimbus Connect solution for their contact centre. The solution offers superior forecasting functionality to assist with future call volumes and optimising staff levels, while its Australian-built Award Engine is designed to meet the complex nature of Australia's compliance obligations.

nimbus Connect enables a 'live anywhere, work everywhere' world for contact centre and remote-based agents by integrating to agent Softphones to securely manage system access control. This allows Bendigo and Adelaide Bank agents to deliver customer service within their allocated shift time, with warnings and forced breaks to mitigate risk and reduce time fraud.



The nimbus delivery team worked in true partnership with us. Expertise was evident in their understanding of the environment we operated in and were always willing to respectfully challenge us as the client on ways to improve the way we operate.

nimbus provided us with an easy to follow and robust implementation methodology that allowed all parties to understand what is required and when. From a governance perspective, the toolset and documentation were excellent – I am looking forward to working with the team on our next phases of work.

Andrew Della Posta, Project Manager | Bendigo and Adelaide Bank



Project Framework

Following a PRINCE2 methodology for the solution rollout, nimbus created a framework to deliver nimbus Connect within the timeline, building a plan to understand workforce models and provide support and guidance for a successful project delivery.

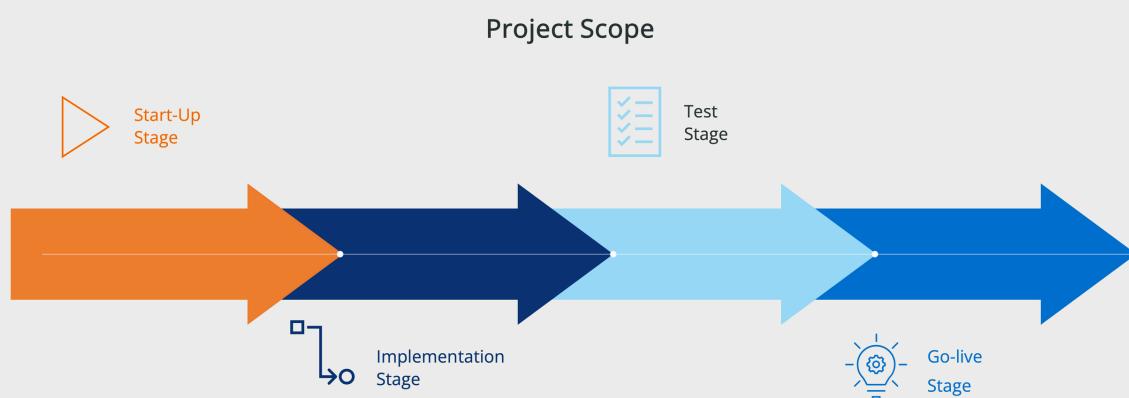
Within the Project Scope, nimbus ensures that key tasks and milestones are reached within each stage to ensure the project reaches its desired outcomes. This includes complete knowledge transfer and upskilling of Bendigo and Adelaide Bank's stakeholders from the start of the engagement.

Project Framework continued

As part of our standard methodology, the **Start-Up Stage** established the key stakeholders, discovery process and solution familiarisation. A governance structure was put in place to establish responsibilities and provide a clear escalation path for project matters to ensure the project was well governed.

Communication was key during the project. Key stakeholders conducted regular fortnightly status update meetings and monthly implementation status reports were provided. Any variations to the scope of the project were documented and approved by key stakeholders.

A comprehensive Discovery was initiated to determine the Configuration Specification document to enable a clear understanding of the scope and budget for the project. nimbus worked closely with the HR and payroll teams to understand Bendigo and Adelaide Bank's key requirements through detailed Discovery sessions and define the solution rules to satisfy forecast and schedule needs, as well as finalise the design Architecture, business process, and security configuration. As a result, a comprehensive Configuration Specification document was produced in alignment with operational requirements.



The **Implementation Stage** of the project saw the design and build of the solution, framework establishment for testing and a solution playback to the client.

End-to-end testing ensured nimbus Connect was correctly configured and integration to Bendigo and Adelaide Bank's payroll provider was achieved. At the beginning of the Test Stage, a testing support log was created for the project to capture questions, issues and defects during user acceptance and parallel pay testing.

nimbus then conducted Solution Playback sessions for the key stakeholders to demonstrate and review how the system worked with their own data.

The final **Go-Live Stage** of the project saw the commencement of nimbus Connect solution training. Adequate training allowed time for Bendigo's staff to raise any concerns.

Using a train-the-trainer approach, nimbus guided and supported Project Managers, Workforce Planners, and Payroll Administrators via a mix of on-site and remote training to learn to navigate the solution. Super Users were introduced as the 'lead trainer' within the Bendigo and Adelaide Bank team to assist other users of nimbus Connect.

Additional training agendas, quick guides and training workshops recordings were provided to the Bendigo and Adelaide Bank team as a future reference point.

“Governance was a strong point on the engagement - the nimbus Project Manager did a brilliant job to reinforce following the methodology and re-baselining the PPM when required.”

Project Team Member | Bendigo and Adelaide Bank

Result

- Over 230 contact centre agents transitioned to nimbus Connect
- Consistent and efficient solution providing unison across operational teams
- Strong governance structure in place to provide clear escalation path for project matters
- Both sides worked closely to produce desired outcomes
- Aligned with Bendigo and Adelaide Banks project objectives -improved processes, delivered on time and within budget

The Result

The implementation of nimbus Connect for Bendigo and Adelaide Bank proved to be a transformative initiative. Thorough support throughout the entire project resulted in a successful transition to the nimbus Connect solution for over 230 of Bendigo and Adelaide Bank's contact centre agents.

As a result of the project, award compliance is now being supported through proactive payroll integration and the delivery of correct employee pay outcomes. With correct forecasting volumes, the strength of customer service delivery is high, and shifts are now better planned for and managed.

The nimbus project understood and addressed Bendigo and Adelaide Bank's challenges, creating a consistent and efficient workforce management solution that has led to greater unison across operational and administration teams, and attributing to significant cost savings.



The delivery of the solution was really well done and please pass that onto the project team.



Project Team Member | Bendigo and Adelaide Bank

Lessons Learned

At the conclusion of the first phase of the project, a survey was distributed to all key stakeholders to reflect on the project experience and evaluate how well it was executed.

Overall, the project's success was attributed to meticulous planning, effective governance, and strong collaboration among stakeholders. This has led to Bendigo and Adelaide Bank decision to rollout the second phase, nimbus' Time2Work solution across the entire business.

Case Study June 2024

nimbus

About nimbus

As one of Australia's fastest growing technology innovators, nimbus is at the forefront of the future of work, providing integrated tools to optimise human endeavour, drive positive business results, and create a "live anywhere, work everywhere" world.

Through future-proofed, cloud, patent protected software, nimbus transforms employee management capabilities for location-based, remote, and work from home staff with compliance, workforce optimisation, and business continuity solutions.

nimbus' suite of Software as a Service products are deployed by some of Australia's top ASX companies, and globally by organisations and Government in the United States, the United Kingdom, Mexico, Canada and the Middle East.