



## Case Study: Achieving International Scalability

for Gladstone Brookes

ConnexAI for Gladstone Brookes

## Achieving International Scalability

In 2019, financial claims giant Gladstone Brookes approached ConnexAI to help facilitate their rapid business expansion plans. Our partnership with the financial claims company enabled them to achieve new levels of success through a strong 'supplier and client' technology partnership, which was subsequently recognised at the ceremony of The Forum Awards 2020. The firm, which has recovered over £1 billion in financial claims for their clients, was able to boost their productivity by 233% and launch an entirely new South Africa team through use of our Omni customer engagement platform.



# Initial Requirement

## Launch New Office

To enable the launch of their new South Africa call centre that would be managed remotely and scale to a globalisation



## Meet Overwhelming Demand

To ensure that Gladstone Brookes' customer teams could handle a new peak in claims as the final date for PPI claims approached in 2019



## Improve Hiring and Onboarding Times

To hire and onboard customer agents at a much quicker pace and get them live straight away with minimal down time



## Key Results

Last year, financial claims giant Gladstone Brookes approached ConnexAI to help facilitate their rapid business expansion plans. By partnering with ConnexAI and adopting our Omni platform, Gladstone Brookes were able to:

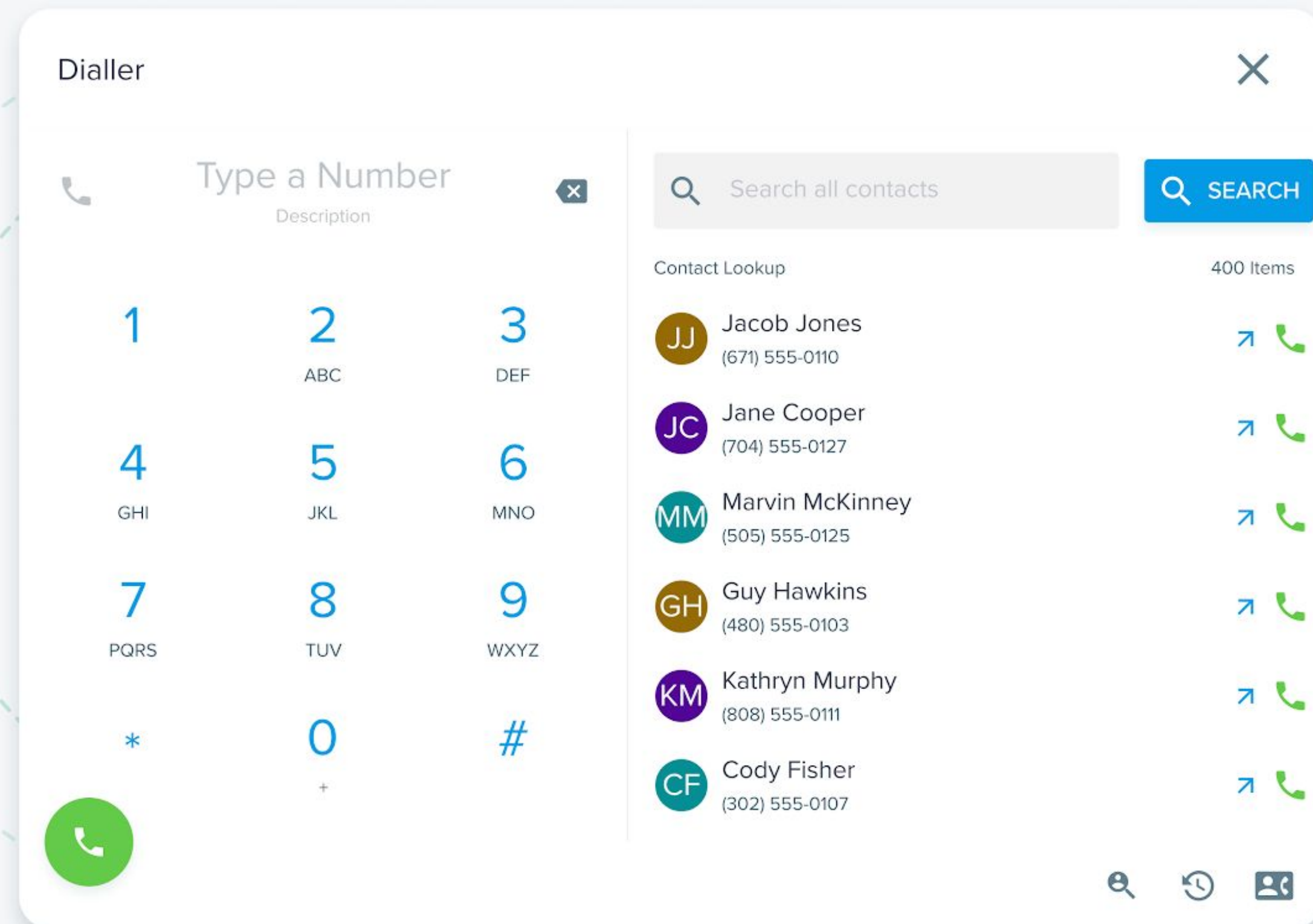
- Rapidly expand their South Africa office from just two staff to a team of 250
- Transition from handling 3,000 to 10,000 customer calls per day (a productivity increase of 233.33%)
- Remain productive throughout the COVID-19 pandemic and enable new and existing agents to work remotely 'no matter what country they are in'.



## ConnexAI for Gladstone Brookes

# Streamlined Customer Processes

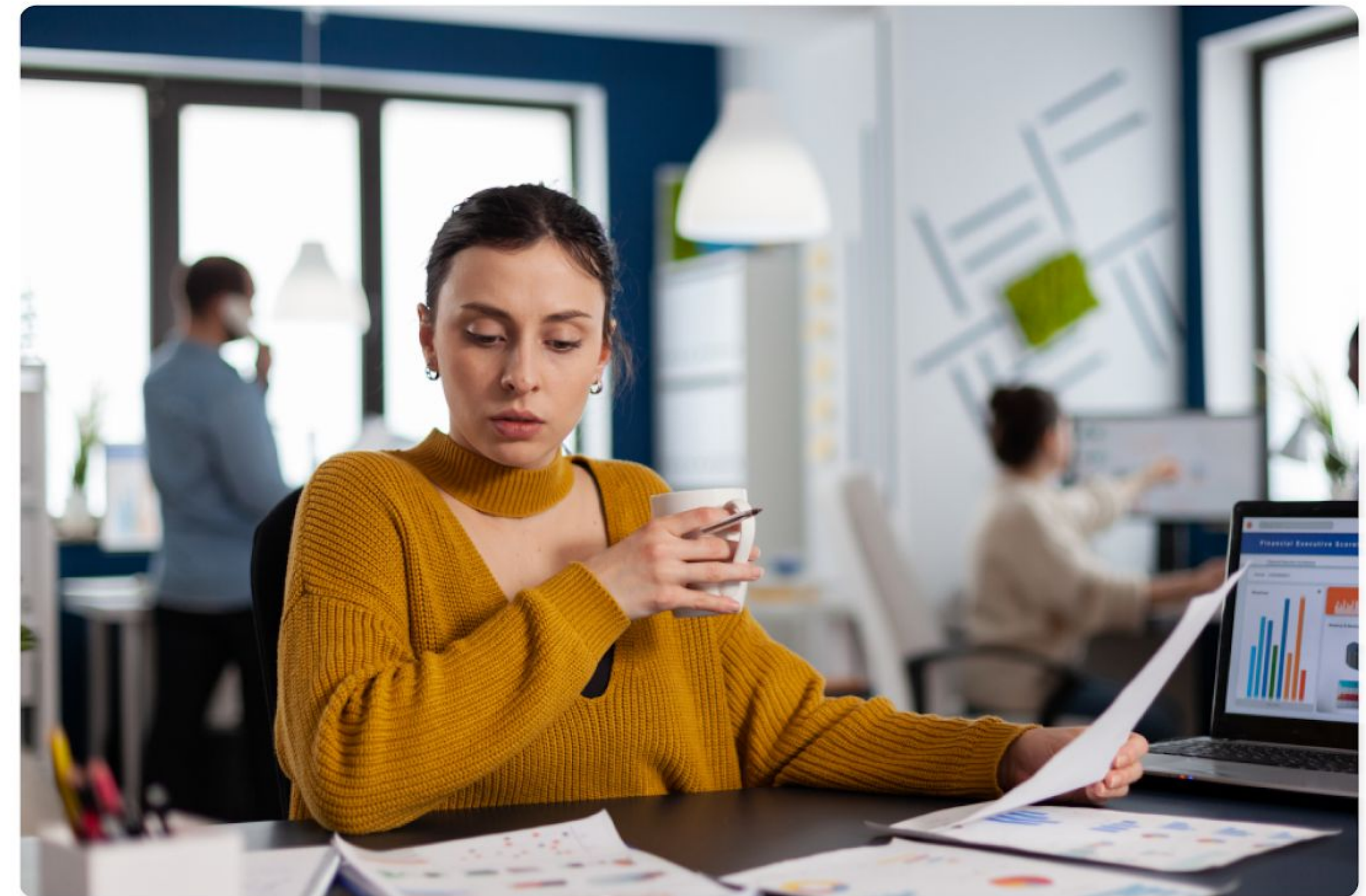
By adopting the ConnexAI platform, the Gladstone Brookes team were able to utilise our Omni features for a variety of campaigns. Their customer team contacted existing customers online to collect information for claims, acquiring new customers through dialler campaigns, as well as calling clients from their existing database to expand new business, and utilising payment IVR functions for over-the-phone transactions. The firms' customer service team also employed ConnexAI's text message features to tailor their approach and help more customers. Custom forms functionality allowed them to streamline digital journeys into texts and to integrate all correspondence through their internal CRM tool.



“ I’ve used different dialler platforms in the past and none have come anywhere close to what ConnexAI does. ”

**Rachel Ashton**

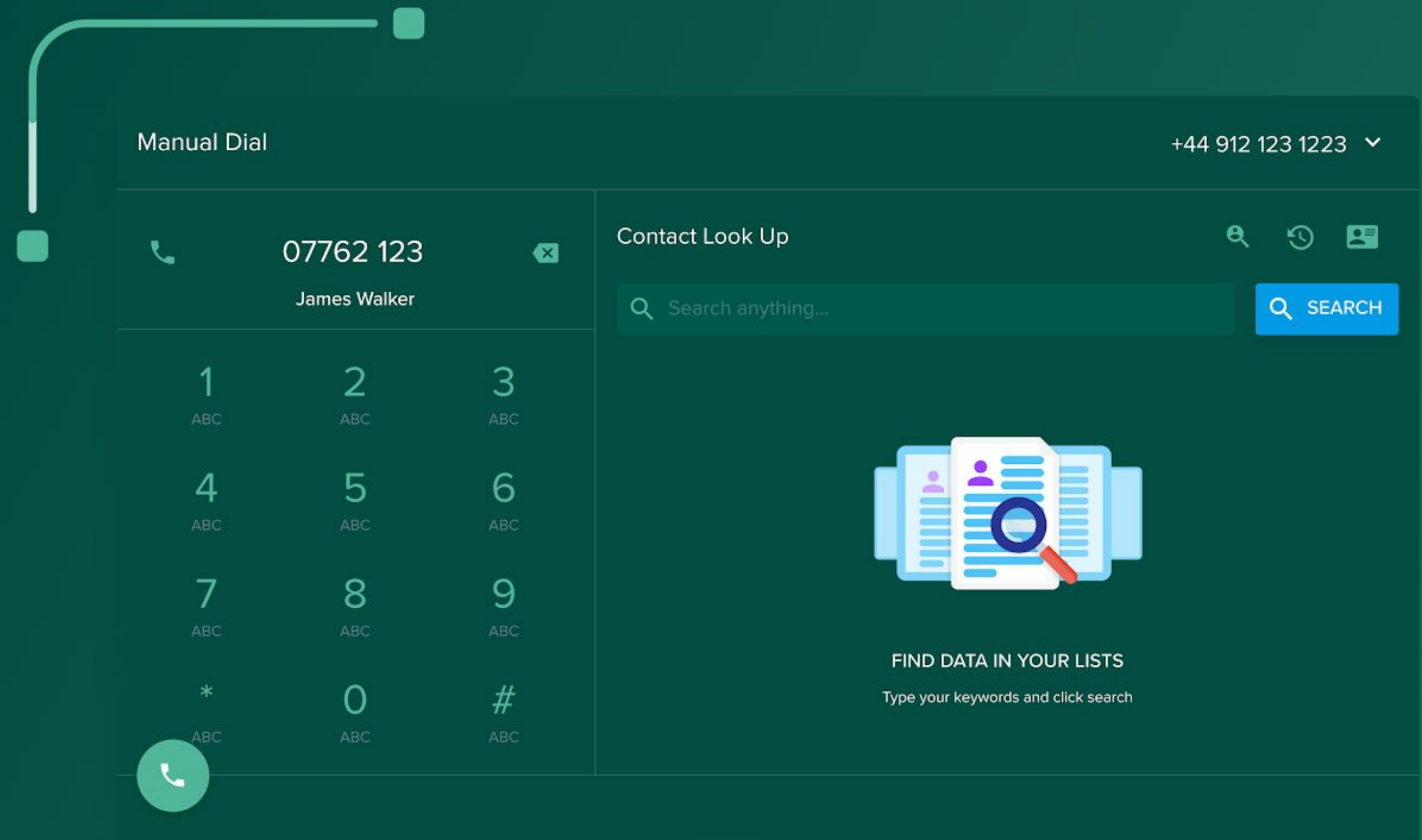
Customer Service Manager at Gladstone Brookes



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# Streamlined Customer Processes

The firms' customer service team also employed ConnexAI's text message features to tailor their approach and help more customers. Custom forms functionality allowed them to streamline digital journeys into texts and to integrate all correspondence through their internal CRM tool. ConnexAI's Omni interface enabled Gladstone Brookes' agents to reduce the amount of time spent communicating with customers as they could handle all claims on one call. When speaking about ConnexAI's ease of use, Rachel Ashton, Customer Service Manager at Gladstone Brookes praised the platform's ability to 'handle multiple cases and interactions' for each customer and 'bring them all together so that customer communication is consolidated'. The customer service team also enjoyed the platform's simple 'campaign' set up features, which allowed them to 'easily duplicate campaigns using templates' and launch new tailored customer engagement campaigns within a few minutes.



## Team Management

When establishing the new team in South Africa, it was vital that the management team could use ConnexAI to scale and easily delegate tasks and monitor live performance overseas. Speaking about the reporting tools of ConnexAI, Rachel Ashton, Customer Service Manager at Gladstone Brookes praised the platform's usefulness in managing multiple teams in multiple locations including remote workers: "ConnexAI really helps in a load of management roles, in regards to reporting. "I can see everything without having to be at the call centre, we can see when agents are on the phone, what they are doing, manage break times and even see when they are logging in or out to make sure that staff are doing all that they have been requested to do. It's helped us get more campaigns out to our South Africa call centre than we ever thought that we could." "In regards to coronavirus, it was really easy to set agents to working remotely no matter what country they are in."

## Strong Partnership

As part of our partnership with Gladstone Brookes, ConnexAI supplied full hands-on training and support to the firms' customer service and management teams, ensuring they were fully equipped to launch their new South Africa team and bridge the gap with local teams in the UK. When asked about the impact of ConnexAI's help in the companies' development, she highlighted the significance of our team's support: "Without the support from ConnexAI in regards to development, and how they have helped our business grow tech-wise, we wouldn't have been able to do half the things we have done here at Gladstone Brookes. "ConnexAI is really a vital part of Gladstone Brookes, and we are going to be taking this [relationship] into new businesses because it has helped us develop as a company." ConnexAI is proud to be partnered with Gladstone Brookes and to have been recognised by leading industry figures for our outstanding 'supplier and client' relationship.





To learn more about how ConnexAI  
is helping businesses to  
overhaul their customer journeys

**0333 344 2435 | Bauhaus 27, Quay St, Manchester M3 4AW**

**hello@connex.ai | connex.ai**