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# CASE STUDY

Principality Building Society  
Homeworking & Back-Office Workforce Optimisation

# INTRODUCTION

Principality Building Society is the 6th largest UK building society with over 70 branches and agencies in Wales and the Borders. A mutual building society, owned by and run for the benefit of 500,000 members, PBS have over 160 years' experience and take care of over £10 billion of customers' assets.

OPX was selected and a pre-roll out pilot commenced in January 2020. This involved a core set of key processes with a limited number of 12 branches and about 75 staff members spread between branch, head office and contact centre.



## KEY REQUIREMENTS AND CHALLENGES

Principality Building Society was engaged in a major long-term program of digital transformation, organisational restructuring and upgrading some core operational IT platforms. Part of this included the requirement to improve efficiency, quality, metrics and flexibility by using the potential for operational processing capacity in branches. This capacity emerged at times of the day when customer facing staff were less busy due to fluctuations in customer demand. Principality also wanted to utilise spare capacity in the front office contact centre to carry out Back-Office processing tasks.



## COVID19 PANDEMIC IMPACT

As the increasingly serious pandemic emerged through February and early March 2020, with implications for the population and workplaces, there was a rapid reappraisal of how potentially useful OPX could prove to be. The pilot was quickly expanded to include over 50 branches and 300+ staff. Most importantly, the use of OPX to support high levels of homeworking for head office and branch staff enabled operational continuity in lockdown from 23 March.

This meant high-quality customer service continued to be delivered and staff working from home (or a mix of home and office) could do their operational processing work effectively, even though team leaders and managers also worked remotely from various locations.

The OPX platform offers a wide range of useful tools such as smart work allocation to maximise efficiency of available staff by using the core 'Get Next' application. This was supplemented by two further tools: 'ScriptFlow', which supports contact centre staff in performing skilled Back-Office processing, and 'E-mail Gateway', which automatically analyses the content of e-mail customer service requests (including other digital channels). OPX then allocates work to the correct work queues for processing which is faster and more efficient than staff triaging on a case-by-case basis.



**“The OPX digital platform gave us flexibility just when we needed it to rapidly change our operating model to cope with the new pandemic impacts.**

**Although we were developing OPX as a long-term strategic solution for our operations, it enabled an agile short-term tactical response. We quickly and seamlessly moved from initial pilot to rollout with many more people, locations, and a broader scope. This meant we could introduce homeworking to effectively reshape how we operate and get through the pandemic disruption.**

**We have continued to meet our customers’ needs with high satisfaction levels in these most difficult of times thanks to the whole Principality team and the OPX digital platform.**  
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Vicky Wales, Head of Customer Services.



# DEVELOPMENT PLANS

## For 2021 and beyond at Principality Building Society.

The essential core OPX functionality used for initial pilot and COVID roll-out has been extended over 2020 and this program will continue into 2021. The scope will cover more operational processes and business areas.

Additional modules in the OPX platform are being developed and rolled out to give the customer services team at Principality the opportunity for greater efficiency and operational insight information. All of this feeds back into improving both products and customer experience.



## ABOUT US

Founded in 2008, we have more than 35 years of experience in the field; we know the workforce optimisation space like the back of our hands.

The nucleus of the Corporate Modelling development team, based in Glasgow, UK and has been working together for over 15 years providing transformational software solutions to solve key business operations efficiency problems.

OPX is the result of over 200 man years of business focused enterprise software development and was conceived to provide a broad, functional, cost effective and yet easy to implement solution to aid the digital transformation of back office operations.

Every customer is unique. That's why we customise our OPX platform to fit every customer's needs precisely. Our Rapid Deployment Method (RDM) takes clients through the five steps of an OPX implementation in around 30 days.

OPX is proven to increase productivity and utilisation; reduce costs; improve cycle times and enhance customer experience.

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The logo for OPX, consisting of the lowercase letters 'opx' in a white, sans-serif font. The 'o' and 'p' are connected, and the 'x' is separate.

For more information about OPX,  
please visit our website.

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