

# Legal & General

## Legal & General Optimises Back-Office Resources to Meet Customer Demand with Verint

### Opportunity

Legal & General (L&G) is a top 20 global asset manager and the UK's largest provider of individual life assurance products. Founded in 1836, the organisation has more than £1 trillion in assets.

Verint® Operations Manager™ is deployed across more than 2,600 users at L&G. The organisation's workflow optimisation team supports approximately 1,500 of these users and is responsible for governing and maintaining the use of the business intelligence platform. This includes providing service/performance reporting and insight, improving the use of the solution across different business units, and ensuring workflow operates at peak efficiency.

Verint Operations Manager is a trusted, valuable employee engagement platform for L&G, helping the leading asset manager optimise the use of resources to meet customer demand and service goals. However, in some areas of the business, it was either not used to its full potential or not used at all.

While maintaining its current mandate and goals, the workflow optimisation team set out to implement or redeploy Verint Operations Manager among new teams to ensure consistent workflow and performance controls. Tom Duffy, who is part of L&G's operational planning team, explains. "We want to ensure data is captured accurately and that each business area has the capability to use Verint Operations Manager. This way, we can effectively drive service and individual performance improvements."

The specific programme goals included:

- Support a large L&G division comprised of several teams with various levels of solution use, knowledge, or understanding.
- Provide accurate data to feed each business area's capacity plan.
- Help front- and back-office departments meet their key performance indicator (KPI) targets.
- Deliver 18 full-time equivalent (FTE) of benefit across departments.
- Ensure controls are in place to monitor workflow and performance.

### Solution

By expanding the understanding and use of Verint Operations Manager, L&G's forward-thinking back-office optimisation strategy is maximising available solution functionality, in turn increasing workflow efficiencies and performance. This includes email integration, file import (integrating with other systems), actual attendance, and task time capture. It equally allows users to pull additional work in addition to the tasks that are allocated to them.

## Customer Success Story



### Solutions

Verint® Operations Manager™



### Industry

Financial Services  
Insurance



### Region

United Kingdom

## Results

- Delivered 23.7 FTE savings versus planned 18 FTEs (year one).
- Projected pipeline of an additional 30 FTE opportunities (year two).
- Achieved KPI deliverables in supported areas.
- Created a strong governance framework.



Verint Operations Manager continues to play a vital role in delivering consistent workflow and performance controls. The business intelligence platform, which is used by more than 2,600 people across L&G, provides the vital insights we need to optimise operational efficiency.”



Tom Duffy - Operational Planning Team, Legal & General

Tom and his team also introduced a methodology to analyse actual time capture information. This is used for regular reviews or post-process improvement changes to set accurate standard timings and quantify any savings.

The use of Verint Operations Manager has driven greater collaboration amongst colleagues in the wider planning team, operational areas, and business transformation teams, enabling a more connected approach to designing process and workflow improvements. This has resulted in additional process efficiency gains.

Other innovations include:

- A set of best practice recommendations covering Verint Operations Manager functionality, workflow, and performance management were defined and agreed upon across operational areas. The recommendations are tailored for each business as required, with expert advice given on both technical solutions and process design.
- Dedicated best practice managers provide training and support to operational managers and staff in using the Verint platform. This helps deliver performance improvements and realize FTE savings.
- Customised reports were created to consolidate key information required to monitor workflow and performance. Support was provided to management teams in using the reports to maximise performance improvements.

## Benefits

Verint Operations Manager is playing a powerful role in increasing employee utilisation and capacity at L&G. The visibility and transparency into work reduces the need for L&G managers to distribute work manually, while, at the same time, ensuring end-to-end service goals are met.

Specific results include:

- Delivered 23.7 FTE savings versus a plan of 18 FTEs in the first year.
- Projected pipeline of 30 FTE (or equivalent) opportunities in the second year.
- Achieved KPI deliverables in supported areas.
- Created a strong governance framework.
- The operational planning team presented on best practice approaches to other operational areas.
- The team’s efforts and results were recognized outside of the division, with requests to extend the support and operational model within other business areas.

Verint Operations Manager continues to play a vital role in delivering consistent workflow and performance controls,” Tom concludes. “The business intelligence platform, which is used by more than 2,600 people across L&G, provides the vital insights we need to optimise operational efficiency.



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