



# Yorkshire Building Society

## CASE STUDY

# YORKSHIRE BUILDING SOCIETY

Yorkshire Building Society (YBS) is the third largest building society in the UK. With its headquarters in Bradford, West Yorkshire, England, YBS has been providing financial services since 1864 and today offers a range of products such as savings accounts and mortgages. YBS proudly serves nearly three million members across the UK from a UK-wide branch network and multiple call centres. Yorkshire Building Society also includes Chelsea Building Society and Accord Mortgages.

- CUSTOMER

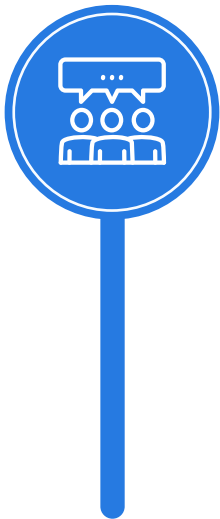


- INDUSTRY  
Financial Services
- LOCATION  
United Kingdom
- SOLUTION  
Appointment Booking System

To learn more about YBS please visit their website here: [www.ybs.co.uk](http://www.ybs.co.uk).



Source: [www.ybs.co.uk](http://www.ybs.co.uk)



# THE CHALLENGE

With such a large customer base across the UK, and over 3,000 members of staff, serving customers using appointments has been core to the business for some time. As YBS has grown in recent years, the need for an appointment booking solution that could scale to meet demand and the organisation's vision was becoming apparent.

01

## Declining system performance

With hundreds of branch and agency locations, as well as call centres, the demand on the existing appointment booking platform was proving too much, which eventually began to directly impact on staff performance and the customer experience. A need for a higher performing and scalable system was required.

02

## Building frustration and inefficiencies

A knock-on effect of an underperforming booking system was leading to operational inefficiencies for staff trying to create and serve appointments.

03

## A lack of true data and insight

Further down the line, a lack of reporting data and insights meant YBS was not able to make the strategic decisions they needed to in order to best shape their appointment booking solution and ultimately customer service.

04

## A need to innovate

With numerous innovative ideas in mind, YBS continued to look for a solution that could enable them to fulfill their vision of how appointment booking would support their staff in serving customers and, a supplier who would bring ideas to the partnership to further drive impactful innovation.



# SOLUTION OVERVIEW

ACF worked with Yorkshire Building Society to implement an enterprise Appointment Booking System, using the Q-Flow platform, that would achieve the following key goals:

- ✔ Enable meaningful reporting data insights
- ✔ Increase overall system performance and stability
- ✔ Increase speed of booking and serving of appointments
- ✔ Restore the faith in appointments among the branch and call centre staff
- ✔ Enable YBS to expand their system and innovate, aligned to their vision
- ✔ A seamless, overnight replacement of the existing booking system





# SOLUTION OVERVIEW

## **Q-Flow Appointment Management & User Interface**

Using the Q-Flow web user interface, staff across the branches and call centres can see 100% real-time availability of the entire estate and book customers in for their appointments in a matter of seconds, matching the customer to the exact member of staff or branch they require.

## **Rota Management**

Staff can also very easily manage their working patterns very easily within Q-Flow, ensuring that all booking availability shown to customers is accurate in real-time.

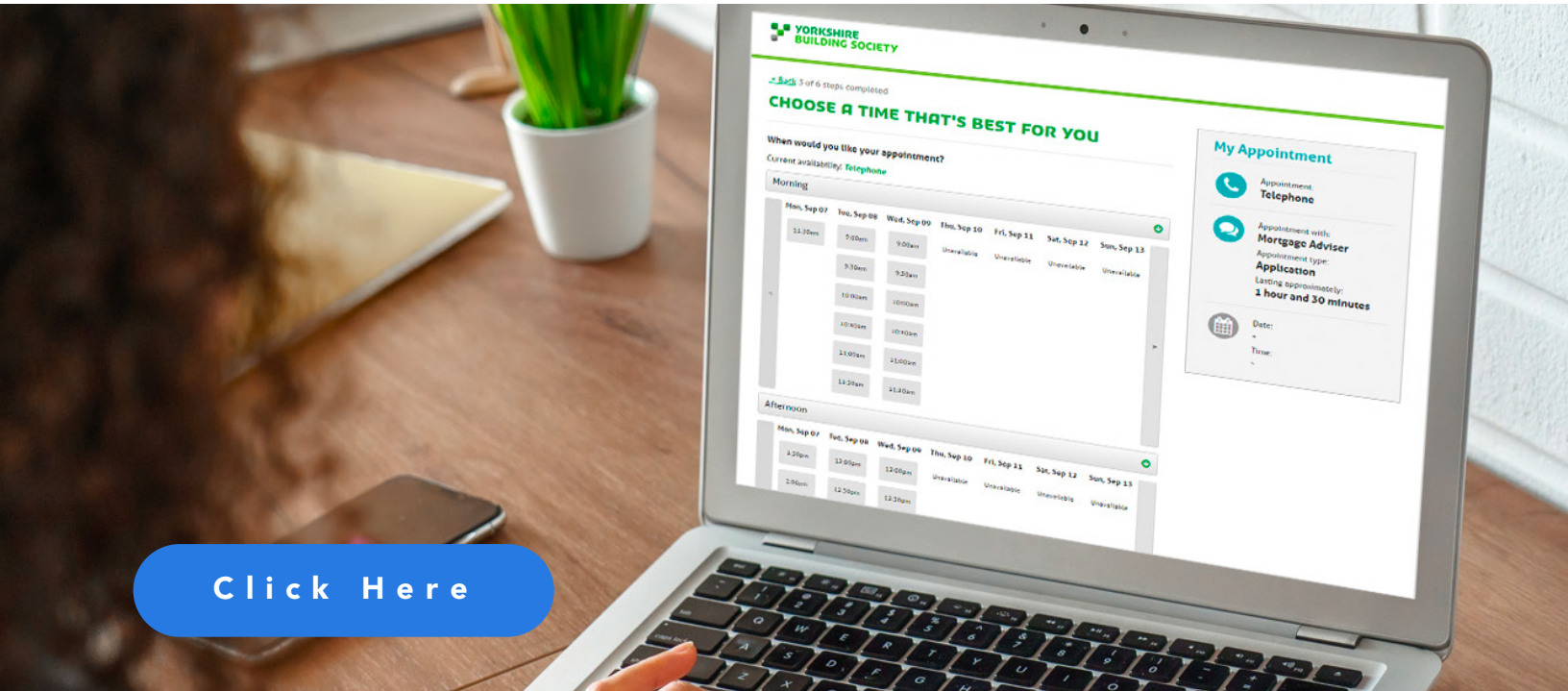
## **Online Booking Solution**

Customers can book online via the online booking solution which works effectively across all devices and makes the booking experience simple and effective. YBS is able to easily switch channels on and off for appointments using Q-Flow, which is immediately shown on the online pages.

## **Q-Flow Reports & Insights**

Branch and regional managers can see valuable reports which give a present view of the business performance, including total appointments booked, served, average service times, SLA comparisons and the % of calendar utilisation across a given period of time and locations.

The central administration team are also able to see organisation-wide data for all key metrics required. This data is passed directly across from the Q-Flow database to a central reporting system for YBS to create the exact reporting views needed.



## Cloud hosting

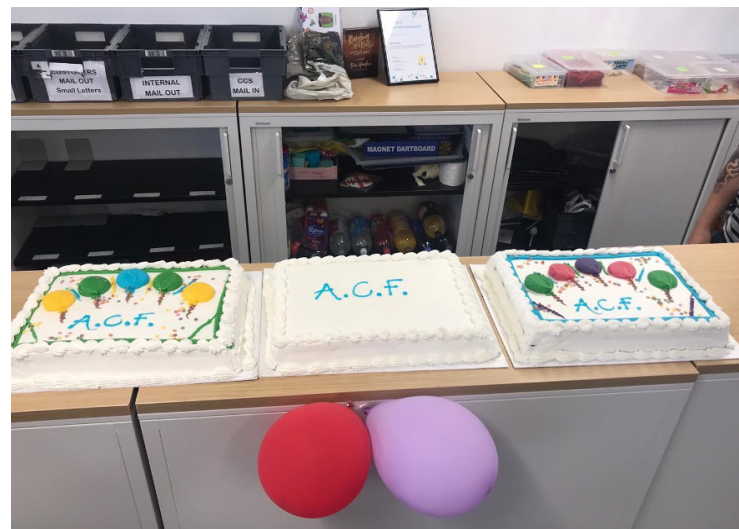
YBS decided to host Q-Flow in the cloud using ACF's Azure hosting. The solution is fully GDPR compliant, with ACF being fully ISO27001 certified also.

## Seamless delivery

ACF and YBS worked together to deliver the solution with a continuous transition, with the final step all being delivered from one day to the next. All data was successfully migrated from the old system into Q-Flow to ensure all future appointments were not missed and data integrity remained.

## Support & Account Management

ACF Technologies supports YBS with any issues that may arise and organizes quarterly account meetings to ensure the system evolves as YBS requires.



Source: YBS project team



# THE RESULTS

- ✔ Reduction in average booking time
- ✔ Improved staff satisfaction with the booking system
- ✔ Improved visibility of data and insights using the reporting suite
- ✔ Increased overall customer satisfaction for appointment booking journeys
- ✔ Increased overall staff efficiency for booking and serving appointments



The solution provided by ACF completely overhauled our appointment booking system. The integration was seamless, its real-time service and ability to be managed remotely for multiple locations is fantastic, and its intuitive and flexible design means customers can quickly and easily get the appointments they need, where and when they need it at the touch of a button. Ultimately the solution has made us much easier and efficient to do business with.



**Linzi Piper**

Operational Improvement  
Manager, Direct Mortgages YBS



**ACF**  
TECHNOLOGIES

Find out more about ACF Technologies customer experience solutions, you can get in touch by [booking a demo](#) or sending us an email [acinfo@acfttechnologies.com](mailto:acinfo@acfttechnologies.com). We'd love to help.