

## **CAPABILITIES**

### **'Customer Experience' Management**

- Designing and implementing B2C and B2B (Consumer and SME) for the public and private sectors - end-to-end customer experience models to drive competitive edge and grow market penetration.
- Definition and management of integrated insurance programmes linking to actionable functional plans and meaningful strategic and operational change mechanisms.
- Design and implementation of customer, needs-driven service segmentation models based on weighted criteria including value and portfolio complexity.

### **Operations Management**

- x Definition and delivery of linked volumetric models with KPIs, measures and integrated management reporting.
- x Generic and specific design and implementation of model office/service incubation models to test and trial end-to-end change initiatives at minimal commercial risk.
- x Management of large operational contact centres from an inbound, outbound, front and back office perspective – across sectors including outsourcing, banking, telecommunications and 'infotainment' .
- x Implementation of complex customer-centric strategies across channels and segments – through people, process and systems & technology enablers.

### **Project and Programme Management**

- x Programme management of multi-disciplined projects and resources, participating in and management of project boards and steering groups.
- x New start-up and existing business programme direction and architecture – across disciplines and processes.
- x Consistently delivering to challenging timescales and strict cost targets.
- x Supplier evaluation, management and cultural integration.
- x Planning requirements, defining and managing a wide variety of customer, user and enterprise pre-launch needs and scenarios.

### **IT and Systems**

- x Definition and integration of major software components within service-centric businesses – including CRM, workflow and document management, billing systems and other applications – for 'infotainment' and telecommunications sectors.
- x Management and direction of a medium-size (50) customer management systems team involved in multi-site system upgrades and prioritised roll-out of user-base functional requirements
- x Managing and defining requirements.
- x Supplier selection and management against user-based, technical and commercial requirements.

### **Leadership**

- x Managing large teams (up to 1,000) directly and indirectly.
- x Leading from the front, by example and using an 'inclusive' style.
- x Helping others to take responsibility, establish logical options and become self-sufficient.

### **Communications**

- x Presenting to large and varied audiences across the world in public and organizational/client environments.
- x Clarity of purpose, focused feedback, prioritised and actionable recommendations.
- x Numerate and articulate; presenting strategic and operational imperatives to all levels from CEO.

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### **CAPABILITIES (continued)**

#### **Change Management**

- x Dynamic change agent, questioning and challenging.
- x High focus on building scaleable and flexible infrastructures, processes and people to meet rapid competitive requirements.
- x Definition of outsource provider strategies (including offshoring) ; developing dynamic bid processes.

#### **Strategic Planning**

- Demonstrates wide and functionally diverse business analysis experience relative to service experience strategies as an integral part of proposition management.
- Analysis and competitive benchmarking/best practice to create market differentiation.
- Driving service experience strategy across the enterprise and ensuring sustainability.
- Design, development and implementation of radical people, change, development, training and differentiation programmes.
- Development of individual and team competencies and profiling across the business.
- Resource satisfaction measures and feedback into strategic direction and operational change.
- Creation and use of human capital and knowledge to drive forward business direction and achieve strategic objectives.
- Definition and implementation of 'culture maps' which clearly illustrate behavioural expectations and strategic business fit.

#### **Outsourcing**

- x Significant knowledge of the UK outsourcing market within the customer service sector.
- x Speaker, a reviewer of operational centres and a facilitator of new business opportunities. Considerable experience of working in insurance on both sides of the table –and to re-engineer strategies, through to enabling end clients select the right outsourcer and additionally evaluating outsourcer competencies and performance.

#### **Due Diligence/Audit (Service Operations)**

- x Actively involved in MBI opportunities and facilitating sales and acquisitions in an insurance market which is rapidly consolidating.
- x Conducting 'due diligence' /'audit' appraisals and reviews of operational customer service customer operations units and associated functions and dependencies.
- x Use of structured operational 'audit' processes to gather, rate and compare information, output gaps and determine action plans

#### **Personal**

- x Under-promise and consistently over deliver.
- x Driven by change, challenge, innovation and creativity.
- x Believe that true market differentiation is created and sustained by people and enabled by systems, technology and process.
- x Passionate champion of the customer.
- x Commercially aware.
- x Breadth and depth of experience. Competency and market sector spread.
- x Exceptional market reputation.

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### CAREER HISTORY

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#### 2005 – current LBM /UIB Lloyds of London – Manager

Design, development and delivery of end-to-end customer experience solutions covering contact/call centres and all associated customer service and customer contact –

Charged with directing large complex programmes, from both technical and organisational/business change perspectives. Setup a project – threads, phases, associated milestones and configure toolkits. Ensuring optimum organisation for the efficient delivery and achievement of commercial objectives.

Supervision. Take responsibility and accountability for the risks and compliance issues, allocating appropriate resources to the management of risk and to dispatching compliance responsibilities.

Contribution to workshops, discussions and debates to ensure all financial risks are adequately considered. Multi-discipline placement in Lloyd's and companies including analysis, RI, environmental placement for property portfolios, motor. Ensure that risks are logged on the Risk Logs. Restructured £500 million Terrorism insurance portfolio.

Work here embraced people, training & development, communications, technology usage, management information & reporting, project & program management, together with a wide of other consultancy advice including service strategy workshops, hands-on help during recovery from a major disaster impacting many areas of the business.

Work has involved best practice/benchmarking, review of strategic intent and imperatives, business as usual analysis, scenario modelling and planning, customer research, full project management and direction of a range of internal resources – all against a background of commercial effectiveness and the need to dramatically change the end-to-end customer experience

Monitor & review the overall movement of claims reserves.

#### 2002 - current Wilkes Management Services Limited – Managing Director

Wilkes Management Services Limited, is a niche consultancy organisation, specialising in the design and development of insurance related strategies and operational implementation, often initiated through organizational reviews/audits.

I have been involved in an assignment for HML UK, reviewing and comparing their customer retention activities undertaken through both in-house and insurance and recommending changes to contact strategies (outbound and inbound), systems, operational imperatives, campaigns and agent reward structures.

Was involved in the development of a number of propositions, including a high-end outsource service capability; delivery of a user focused ROI model for a major UK energy provider; conducting 'service experience' audits for major organisations in the private and public assisting a major customer service outsourcer with generic and specific bid processes.

Test new processes, procedures, KPI's, products, services, methodologies, systems, technology, routing, and analysis.

Placed and designed insurance for CHAS scheme 2,500 plus UK contracting companies.

**1996 –2002      Financial Surety & Guarantee Limited – Founding Director**

Partnership with a London Investment Bank

**Clients included:**

RSA, Norwich Union, KPMG, Morgan Stanley, Red Partnership, AXA, NCR, Star, IGI, Uraeus Telecom, NFU, Avon Insurance, Lombard, Independent, Baker Kidson, Microsoft, Dti, Generalli, Neville Russell, Shell.

**Typically consultancy and interim management work covered the following areas:**

- x            New business launch strategies for customer service.
- x            Bid management design, vendor selection and post-selection management – in areas of self-service, billing solutions, customer management, knowledge management systems and service delivery technology.
- x            Operational business planning, performance, forecasting and modelling.
- x            Development and implementation of systems strategies.
- x            Definition and facilitation of business process development.
- x            Definition of telemarketing operational requirements.
- x            Operational audits and implementation of prioritised change programmes.
- x            Outsourcing contract management and benchmarking.
- x            Organisational infrastructure.
- x            Customer satisfaction programme and implementation of focused action plans back into the business.
- x            Development of service experience aspects of new product propositions.

**Assignment examples:**

**DTI – Nuclear Power**

From the initial pre-launch/post-licence bid stages, was employed as Insurance Director for Management aspects of the NDA launch programme. Responsible for definition and design of extensive insurance documents for outsourcing of customer facilities; for recommendation of organisations for the tender list and complete end-to-end process of supplier selection, including supplier comparisons and evaluations and the chairing of the selection board. Following selection of outsourced partner, led the implementation processes, chairing various sub-groups responsible for delivering a wide range of service elements, including responsibility for detailed forecasting and modelling, unit costs, contract negotiations, business processes, systems and technology input, cultural dimensions, marketing interfaces, management information, training and other key areas of service differentiation; ran the service operation on an interim basis. Sat on the Project Steering Group, and controlled over £3billion in assets and cash.

**Uraeus – Mobile Telecommunications**

Assigned to undertake the feasibility and development of a strategy for the delivery of a service/call centre operations in Lagos, Nigeria. Involved a full audit of the client's existing business and future strategy as well as an analysis into resourcing, profiling, political and economic considerations as well as comparative remuneration research and infrastructure costs.

**IGI – Insurance**

Review and evaluation of the customer service and billing system proposition and functionality for launch of a new insurance company, life, health and medical insurance coupled with on-going involvement in development and delivery of agreed end-to-end service solutions, including maintaining relationships with the system integrator, based in Germany.

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**HML (Homeloan Management Ltd) – Insurance Programme Director**

Handling assets of over £48 billion for over 40 clients, HML in Skipton, Yorkshire and employs over 1,800 people in Skipton, Padham, Glasgow and Derry. Tasks involved working closely with Markets team:

Reviewing origination, structure, negotiate and oversee delivery of business, maximising opportunities from existing and potential clients, to achieve agreed business targets and objectives.

To ensure that new business meets the credit risk integrity of the portfolio.

Led review of service lines which include amongst others Morgan Stanley, Bristol and West, UBS, National Bank of Australia, Skipton Building Society and contributing to the wider business building of the firm as a whole. My review covered products and processes, retail distribution and customer operations with the aim of delivering projects across operational improvement, product innovation, business retention and loyalty, and model and manage the impact of regulation.

**1994– 1996      EMAP – freelance**

- Put in place procedures and checklists to allow delegation of this function in time and act as manager for launch and publication of magazines.
- To provide financial crime expertise on risks and issues and offer appropriate risk mitigation solutions for Fraud magazine and anti money laundering.

Following completion of a presentation appointed for Policy and Execution; Processes, Practices and Procedures;

**Major Achievements:**

- Designed and implemented an innovative approach to customer satisfaction ratings, feedback and links to rewards – subsequently became an industry standard.
- Developed a fulfilment strategy and launched broker and insurer-training course for marketing.
- Developed a publication for mining and mineral extraction and pre-sold all advertising.
- Led work looking at the future use of on-line publications and e trading - linking to work flows, business processes, activity-based costing and a range of other key issues.

**Jan 1993 – Jan 1994**

**Muscat Insurance Services OMAN.**

**Position:**

**Operations Manager (fixed-term contract)**

- Carry out a review of processes and procedures and put in place steps to help the team fulfil their roles and comply with all its legal and regulatory requirements. . Manage the staff and ensure that all decision-making is properly documented and policies and procedures are being followed.

**Mar 1989 – Jan 1993**

**Robert Fleming Insurance**

**Position:**

**General Services Development Director**

The work involved initial research, preparation and presentation of an ideal "state of the art" action plan and philosophy for the future strategic use of customer services through the leadership of an in-house project team made up of senior staff.

**Sept 1986 – Jan 1989  
London)**

**Inchcape plc / Aon Bain Hogg (Lloyds of**

**Position:**

**Account Manager**

**Apr 1984 – Aug 1986  
London)**

**Bradstock Blunt & Thompson (Lloyds of**

**Position:**

**Assistant to Technical Director**

**Mar 1980 – Apr 1984**

**Trafalgar House plc**

**Position:**

**Assistant Manager**