



HUNTSWOOD

A ResultsCX Company

Driving fair value by testing outcomes delivered through their non-advised contact centre



Challenge

A major UK pension provider needed to assess whether customers contacted by its outbound sales team were making fully informed decisions about their retirement options. The client engaged us to investigate and validate the quality of these outcomes against regulatory expectations.

Solution

To assess customer understanding, Huntswood conducted an outbound engagement exercise, successfully contacting over 340 customers and completing in-depth interviews with 80 participants. These interviews explored whether customers fully understood the implications of their retirement choices. To maximise participation, we introduced flexible “after-hours” slots, ensuring accessibility for customers with limited availability.

We tested six key outcomes mapped to the end-to-end customer journey, covering access to information, understanding the firm's services, clarity on existing plans, awareness of all available options, consideration of personal circumstances, and timeliness of service. Using cohort analysis, we tailored interview approaches to different customer scenarios, ensuring efficiency and depth of insight.

Outcome

Assurance over approach and further enhancements - Our review reinforced the client's risk management approach and validated that remedial actions—such as increasing staff capacity and implementing additional training—effectively addressed the root causes of previously identified issues. We provided assurance that the firm was executing the necessary mitigating measures and highlighted opportunities for further enhancements. Our findings confirmed that the remedial steps taken by the client eliminated the issues that had been observed.