

# UK Retail Bank Incentive Management Programme



In September 2006 Barclays launched the Barclays Incentive Programme to introduce an end to end incentive management environment.

During 2007 the programme involved the formation of incentive design, operations and support functions and the roll out of incentive plans to Frontline, Personal Banker and Management staff within the Branch Network.

From 2008 the solution was extended to Area Directors, Area Performance Managers and Regional Performance Directors within Branch Network as well as Sales and Service Advisors, Team Leaders and Managers within Direct Channels.

## The Experience

A UK Retail Bank programme team was formed to introduce the

new schemes to the Branch Network within a 6 month window. This team, including Aiimi as a delivery partner, worked with key business stakeholders to deliver the change required.

Aiimi was engaged to design, build and implement the ongoing operations and support processes that would transition the schemes from the programme into a Business as Usual (BAU) environment.

The first incentive payment to Barclays Branch Network eligible employees was made within 6 months, however the implementation was by no means complete at this point.

As with any project having this level of organisational and cultural change, lessons were learned early on which subsequently drove the next stage of implementation.

## Aiimi &

### Barclays Bank Plc

*Barclays is a major global financial services provider engaged in retail and commercial banking, credit cards, investment banking, wealth management and investment management services, with an extensive international presence in Europe, the Americas, Africa and Asia.*



The following were particular challenges experienced:

#### ■ Data Quality

In many cases the source systems had not been designed to capture the data in the format required and in others the completeness and timeliness of the feeds proved to be problematic.

#### ■ Systems Infrastructure

Integration of key systems in a reliable and comprehensive manner proved to be a real challenge, requiring a far greater level of dialogue between internal bank functions than had ever been needed before.

#### ■ Skills and expertise

The Programme team was built rapidly, drawing on external knowledge and experience, which then needed to be adapted to Barclays own environment and

embedded within the standard operations of the bank.

### ■ Processes

A full set of procedures relating to the calculation, checking and authorization of incentive payments as well as post payment appeals and adjustments needed to be created, refined and implemented.

With the focus on the roll out of plans and calculation of payments, not all of the support tools were in place from day one, placing enormous pressure on the operations and support infrastructure.

### ■ Management and Control

Tactical decisions made to minimise the impact of system and data related challenges on incentive payees, significantly impacted Incentive Operations and Support.

## The Maturing Environment

Aiimi have worked closely with all aspects of the Barclays UKRB Incentive and Reward Teams over the past 2 years in order to stabilise the environment and transition from a programme of Change to Business as Usual operational processes.

Incentive schemes are now fully operational across UKRB Branch Network, with an average query rate of less than 2% per month. A low query rate such as this is testament to efficient operation of the scheme.

## So what has made the difference?

### ■ Data Validation upfront

Comprehensive data checks executed at all stages of the

process enable early identification of potential issues and remedial action to prevent their occurrence.

### ■ Root cause analysis

Experience and practical business knowledge enables prompt identification of deviations in trends. Inevitably issues will occur but by looking for trends upfront, early and relevant communication can now be issued and a consistent means of resolution executed.

### ■ Ownership

The operation now has clear business engagement and ownership.

The business areas accept responsibility for maintaining timely and accurate data, recognising that incentive payments are directly impacted by errors in source data.

### ■ Controlled change

Medium to large scale change is strictly controlled within a 6-monthly cycle. This enables the operations and support teams space to introduce and test the changes fully before deployment and evaluation of the success of the benefits of the change by the business. Simple product or value changes are made as required to meet key business drivers but within a control framework

### ■ Managed approach to incidents

Robust incident management ensures prompt identification, classification of severity, impact assessment and managed resolution. The incident log provides a valuable record of both the history and owners of incidents to support service reviews, but also a full record of actions taken to ensure ease of reference for related issues and queries.

### ■ Skill profile

As the operational and support environments matured, the skill profile of the individuals within the operations and support team has evolved to meet the changing focus.

The early stages of the programme required a detailed knowledge of the underlying system technology and technical design, however as the operation has matured the emphasis has shifted to a broader knowledge of data analytics and composition of the plans.

### ■ Customer focus

Reorganisation of the teams to focus on key business areas ensured that customer requirements and communications were foremost in the minds of the operations and support team. This produced great results in the engagement for the delivery of 2009 change.

### For more information:

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*Aiimi are a business solutions consultancy that specialises in Sales Performance Management (SPM) and Incentive Compensation Management (ICM). Aiimi has expertise across all components of an incentive solution.*

*Our services centre around the creation of a flexible resourcing model which fits our clients individual requirements and we have expertise in a wealth of market sectors including telecommunications, banking, insurance, hi-technology and engineering.*