

Executive Search

Case Study

Senior Director, Customer Operations and Quality

For a Fintech firm

Technology Practice

Background

Our client is a fast-growing Fintech firm headquartered in India. They are a technology first organization which has attracted solid fund raises from marquee investors and a sound business model which has enabled them to get profitable as well.

What was the exact ask/ role specification

The client was looking to hire a Head of Customer Operations & Quality (Sr Director grade) who will play the critical role of building, leading, and managing the customer operations team. The role will be responsible for identifying and bringing onboard multiple outsourced contact center hubs from across different locations catering to customer service operations.

This role would report to the SVP / Function Head and will work very closely with the founders. This role was based out of Mumbai.

The process

The client initiated the process by sharing with us a brief job description of the role, post which there were calls set up with the key stakeholders for this specific role. During these discussions, their expectations regarding the candidate fit were shared. We used this information to fine tune the job description and make it more accurate and to ensure that it reflected the asks more clearly.

Post buy-in from the client on the job description, we went about identifying the universe for this role starting off with the list of target organizations as called out by the client ie competitors and B2C internet organizations. From this list of organizations, the 1st longlist was presented. The client reviewed the list and called out the candidates who they believed were in sync with the requirement. We focused on going after the shortlisted candidates and over the next 3 weeks presented 2 batches of 2 candidates each and initiated the interview process for these candidates.

As the client started their interview process, they also started finetuning their ask based on the skills and experiences of the candidates that they were talking to. While they interviewed the candidates over multiple rounds, they felt that these candidates brought the limitations of the organizations they have been a part of through the years. The next batch of 2 candidates also were perceived as such. It was clear that the client's expectations were beyond what they had stated.

During our periodic review with the client, we brought this up and suggested that the client should also look at candidates who did not come from this specific universe but came from organizations which were renowned for their customer services practices. The client agreed and called out a bunch of organizations as potential targets. We redrew the universe and in a span of 2-3 weeks reverted with a batch of 3 profiles from this set of organizations.

The client moved fast and within 2 weeks we had on our hands 2 candidates who had completed their interview process and were ready to be offered. The 1st priority candidate was extended an offer and after detailed negotiations, the offer fell through. The offer process was then initiated with the second candidate and in a week the offer was agreed to and finalized. The candidate came onboard post completion of a 2-month notice period.

The selected candidate brought more than 19 years of total experience in Customer Experience & Customer Service Operations. He brought an extensive experience working across industries such as E-Commerce, Airlines, Telecom (Domestic & International), Utilities besides others.

PeopleAsset differentiator

- Working closely with the client team to better understand the candidate fit (for all the interviewed candidates) and the client ask.
- Thorough evaluation of the candidates coming from various types of organizations and sectors and ensuring that they meet the criteria set.
- Focused candidate handholding during the entire phase of the notice period to ensure that he was engaged with the organization deeply even before he onboarded.