

# Bringing gaps in **employee competency** to the forefront



How LV= are **underpinning regulatory learning** with AI to grow customer value, improve service levels and reduce complaints



Clever Nelly brings to the forefront any training opportunities that our team need.

As a direct result of working in tandem with Nelly, we've been able to get into a really good place with our training on critical topics, such as the Consumer Duty. We've also had really good results in the vulnerable customer space; Nelly's insights helped us to develop our training materials and we've since seen a 42% improvement in employee knowledge.

Nelly gives us a really good proof point. Questions are rolled out to the team after training and we can see from their scores whether the knowledge has been embedded.

Paul Goodman,  
Customer Experience and Training Manager



## A reactive solution to embed knowledge

Employee competency increased by 30% for business-critical compliance categories with Clever Nelly, which contributed to LV= seeing a reduction in average call wait times from ten minutes to 1.5 minutes in some areas.

For over 180 years, LV= General Insurance have been committed to helping individuals and families to live with financial confidence, with the vision to be “Britain’s best loved”.

LV= remained steadfast to this purpose throughout the pandemic, where it became even more prevalent as a trusted financial services firm to identify markers of consumer vulnerability and respond accordingly.

One area of their business that was particularly affected by COVID was employee training. This had formerly followed the default approach within the sector, consisting of one-to-one or group training modules that were ‘ticked off’ on completion.

In the absence of consistent training activity under lockdown, LV= recognised that they needed to not only increase their use of existing tools for training but explore solutions to enhance an employee’s learning journey.

Their objective with Clever Nelly was to support new employees hired over this time, as well as tenured colleagues, who no longer had the same ability to benefit from peer-to-peer learning opportunities.

LV= have had tremendous success working with Clever Nelly since March 2022.

Employee competency has increased by more than 20% across all six user groups, with a highest group improvement of 38%. These improvements in knowledge have translated into significant customer service and operational improvements for LV= and their customers.

In tandem of their efforts with Nelly, complaints have dropped by approximately 62.5% from the peak volumes seen at the height of COVID, with average call wait times down from ten minutes to 1.5 minutes in some areas of the business.



We’ve been able to be really reactive with Clever Nelly, quickly cementing knowledge after training has been rolled out. There’s been a lot of knock-on effects to service levels; average call times have gone down, complaints have gone down and attrition is significantly lower.

**Paul Goodman**, Customer Experience and Training Manager



**Looking more closely** at the measurable benefits achieved through Clever Nelly.

30%

Average improvement in employee competency in three categories: 'data protection', 'identifying complaints' and 'vulnerable customers'.\*

42%

Improvement in employee competency for 'vulnerable customers' since March 2022.

62.5%

Approximate average reduction in complaints compared to COVID complaint levels.

1 Average improvement for all six user groups. This was calculated from a comparison of data from Mar-May 2022 and Dec-Feb 2023.



Clever Nelly has distributed over 182,979 learning interventions since March 2022.

These interventions – or questions – were authored using the existing training content from LV= and cover eight categories, such as: financial crime, complaints, claims and vulnerable customers. Each user initially received two questions to answer per day, giving them their baseline knowledge profile. After which, the Artificial Intelligence (AI) took effect to personalise learning pathways and repair individual gaps in knowledge.

In the months after new training has been introduced, LV= rely on Clever Nelly's scores to evidence whether that content has been retained by their people.

Managers can see the real-time competency of their team and monitor trends in the data, whilst Nelly's continual assessment methodology helps LV= to be reactive to regulatory change.

To prepare their frontline for the FCA's Consumer Duty, they adapted training materials that would be followed up by principle-based questions in Clever Nelly.

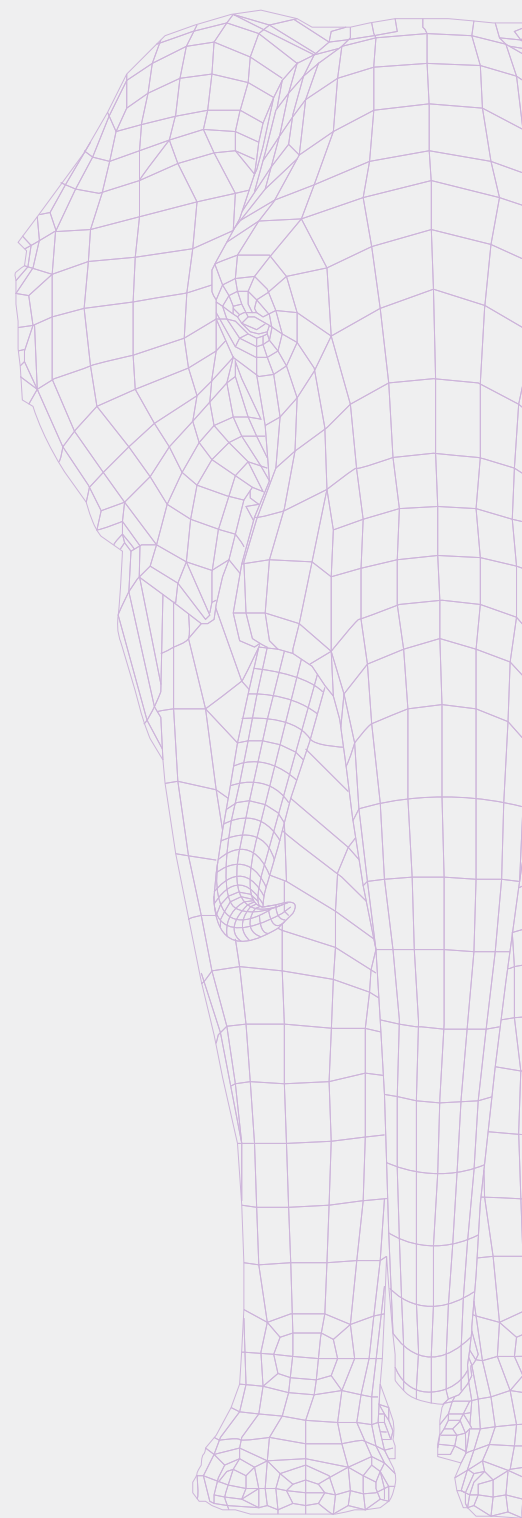
The tangible Management Information (MI) from Nelly will be highlighted as part of their Duty project to demonstrate their compliance to the regulator. It's important to LV= that they continually build and sustain both awareness

and knowledge around the Consumer Duty, which can be fulfilled by the AI automatically.

Half of the users within LV= are currently maintaining a perfect 100% engagement score, performing with 10% higher competency scores.

Providing their employees with personalised training journeys has contributed to a decrease in attrition levels. With engagement in their internal survey up by seven points compared to the previous year, further feedback suggests that a day-to-day focus on training with Nelly has been a key factor in this cultural shift.

LV= have found that Clever Nelly has been instrumental in focusing their attention on the immediate training needs of their team and highlighting where resources require more work. By shining a light on these areas, LV= are able to act on the information and optimise outcomes for their customers.





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