



Real-time recognition of **employee competency**

IMPACT GUIDE

nucleus 

How Nucleus are investing in their frontline advisors to **enhance technical expertise** and drive positive customer outcomes



Clever Nelly is making training accessible

It's taking Nucleus just two minutes a day to recognise and sustainably enhance employee competence across their customer service teams.

With a purpose to make retirement more rewarding, the Nucleus Financial Platforms Group apply their combined expertise and capabilities to deliver great customer outcomes.

To support frontline employees, who must remain consistently adept at navigating an extensive breadth of technical knowledge, Nucleus socialised an Artificial Intelligence solution – Clever Nelly – across their customer service teams.

Data from Elephants Don't Forget shows that the typical baseline for employee competency, pre-Nelly intervention, is 54%.

Nucleus set a remarkable record by attaining a baseline score of 71%, putting them 31.5% ahead of the curve.

During the three-month diagnostic stage, over 5,910 employee competency assessments were distributed by the AI. Clever Nelly used this data to form individual knowledge profiles and customise learning experiences to repair gaps in employee competency in real-time.

Previously, employee training followed the default format within the sector, everyone learned the same content at onboarding with annual refreshers for regulated subject matter.

With continual involvement from senior stakeholders, Clever Nelly is creating an environment where training is accessible; employees want to actively engage in their workplace learning development and participate in daily dialogues with colleagues.

The cultural impact of Nelly within Nucleus is reflected in the significant knowledge improvements being achieved. At a baseline competency level that is already above industry average, Nucleus have seen a further 18% increase in correct answers.

Rather than allowing themselves to become complacent, leaders continue to hone talent and expertise within customer services, whilst at the same time making operational efficiencies to reach their vision. Bitesized training is organised off the back of Nelly's Management Information to target and close knowledge gaps.



With Clever Nelly, our people are really benefiting from the investment in their training. Simply by answering their questions, they're building up their knowledge base daily – almost without realising it. Our baseline scores were pretty high to start with but Nelly is proving to be a great tool to develop their expertise so they can continue to drive really great customer outcomes.

Nikki Coia, Head of Client Solutions

A critical factor behind Nucleus' success with Clever Nelly hinges on the cultural embedding that has occurred since launching as part of National Customer Services week.

At an average employee engagement of 96%, with zero non-engaged users, Nucleus surpassed the recommended engagement benchmark of 80% for optimal performance with Clever Nelly.

Three months on, they have utilised a range of initiatives to help Nelly land with their people. The teams had a dedicated resource to support the roll out internally, with Nelly's purpose cascaded in employee communications and recognition schemes.

Clever Nelly gives Nucleus a "real vote of confidence", helping individuals and managers to recognise and realise their potential, which ultimately means the delivery of better customer outcomes.



Clever Nelly is really user-friendly. It simply pings questions to our people and it's simple to answer and review scores.

It means we know right away where to deliver training off the back of Nelly's MI. We've already seen an 18% improvement since launching in October.

Clever Nelly helps us recognise how knowledgeable our frontline people are. It's a real vote of confidence.

Suzi Norris,
Head of Contact and Service Delivery



Looking more closely at the measurable results achieved through Clever Nelly.

71%

Baseline employee competency across both teams, where typically a firm would present at 54% pre-Nelly intervention.

18%

Average improvement in correct answer scores after three months with Clever Nelly.

96%

Average employee engagement, with zero non-engaged users.

Elephants Don't Forget

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