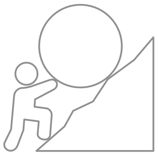
Insite's MegaMap® assessment uncovers $13M+ in savings opportunities for a financial services contact center after multiple M&As.

After a series of mergers and acquisitions left a 1,200-person contact center fragmented across 38 operating groups, this financial services organization needed more than recommendations. They needed a partner who could get inside the operation and hand them a clear path forward. That is what Insite delivered.

$13M+
Identified Savings Opportunities

$1.5M
Immediate Savings from Single Vendor-to-Internal Transition

10X+
Estimated ROI on Workforce Management Initiative



Challenges

Post-M&A contact center environments carry a distinctive kind of operational debt. Across 38 operating groups, this organization was running six different CRM platforms and 44 separate QA forms, with most teams using no workforce management system at all. Valuable technology, including agent co-pilot functionality and automated QA tools, sat dormant. A third-party vendor was being paid to do QA work the company's own licensed tools could already handle. Without a consistent performance baseline, leadership had limited visibility into how performance varied across the operation.

Solutions

The assessment surfaced a set of high-priority improvement opportunities that addressed both immediate cost reduction and long-term operational consistency.

Workforce Management Transformation: Insite identified the absence of consistent WFM practice as one of the most consequential findings of the assessment, representing an estimated 10x return on investment. The client chose a build-and-transition model, with Insite standing up the function before handing it to an internal team.

Activating Technology Already In-House: The client was paying for automated QA licenses while also paying a vendor to do that work manually. Insite's recommendation eliminated the vendor spend and activated the already-owned platform across all 38 groups, delivering immediate savings and consistent performance insight.

Agent Co-Pilot Implementation: An AI-powered co-pilot within the client's telephony platform had never been turned on. This capability listens to live calls and surfaces relevant knowledge base information in real time, reducing handle time and improving first call resolution. This is Human Operations® in practice: technology designed to elevate what people can do, not replace them.

Results

The MegaMap® assessment identified a path to more than $13 million in savings opportunities, with several initiatives capable of generating immediate impact.

Moving a single BPO function from a third-party vendor to an internal team represented a $1.5 million savings opportunity without a long implementation cycle. The workforce management initiative carried an estimated return of more than 10x the engagement cost. Across seven key initiatives, the roadmap outlined a clear route to $10 million or more in total savings.

Beyond the financials, the engagement delivered something equally important: a blueprint. Leadership received a prioritized, data-backed plan that showed them exactly where the problems were, what was causing them, and what to do about it, in a sequence that matched their capacity to act. For a leader responsible for a sprawling post-M&A operation, that clarity had immediate strategic value.

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