

CASE STUDY



Leading Funeral Plan Provider Future proofs customer care

One of the UK's leading funeral plan providers, Golden Charter, has transformed its customer communications by migrating to Daktela's cloud contact centre.



Golden Charter is one of the UK's leading funeral plan providers, with over 30 years of experience in the funeral industry. Based in Glasgow, it is owned by an association of independent funeral directors with an extensive network of over 2,800 funeral director branches across the UK.

In January 2021, the UK government made legislation to bring all pre-paid funeral plans under the regulation of the Financial Conduct Authority (FCA) from 29 July 2022.

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So, to help prepare for the regulatory change and plan for the future, Golden Charter went to Expense Reduction Analysts (ERA), an independent procurement consultant, who recommended Daktela's cloud-based contact management solution.

"Our customers have always been our first priority. We welcomed the new regulations."
Explains Ciaran O'Toole, Golden Charter's Chief Technology Officer

"We sought a solution that would be future proof for our business. Daktela had everything we needed and was cost-effective, secure, and scalable. Further down the line, we'd like the ability to introduce alternative ways of communicating with our customers, such as via SMS and What's App, and this could be easily added on with Daktela. The solution means we could also easily offer hybrid working options for our employees."



**Cost-effective, secure & reliable
Daktela had everything we
needed**

Ciaran O'Toole, Golden Charter



ABOUT GOLDEN CHARTER:

- **Established:** 1990
- **Headquarters:** Glasgow
- **Head count:** 200
- **CEO:** Suzanne Grahame

Along with all the benefits of having a cloud contact centre solution, the migration presented a considerable risk to Golden Charter, as it would involve migrating over 200 Contact Centre and Back Office users from their existing on-premise solution provided by Avaya.

"We understand that large-scale changes can be daunting, so to bring confidence, we offered to conduct a Proof of Concept (POC) exercise." Explains Roy Holmes, Operations Director of Daktela UK.

"Here, we provided a POC telephony system that was tested in a structured and documented manner by a representative sample across the company's key functions."

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Following the success of the 30-day POC, Golden Charter decided to go forward with Daktela and implement the solution company-wide.

With their customers at the forefront of their minds, they did not want to introduce too much change. So Golden Charter decided to have a two-step approach, with the initial phase replacing their existing Avaya system like for like and a later stage focused on enhancing and improving the overall functionality of the telephony system.

Behind the scenes, the company also utilised MS Dynamics for their CRM, so as an open solution, Daktela could easily integrate this and all the sensitive historical data.

In preparation for the FCA regulations, the project needed to be fully auditable, so Daktela agreed to work within a PRINCE2 project management framework. This arrangement meant there was a need for a project manager at Golden Charter and Daktela who would have regular and documented project team meetings, stakeholder reviews and Executive Steering group sign-offs.

The migration from an existing on-premise solution to a cloud solution was managed effectively by Daktela and the company's IT team over a period of 4 months. After complete testing and user training, the system went live and on time with Voice and Email in January 2022.

In July 2022, the FCA confirmed Golden Charter was authorised and regulated as a provider of funeral plans. Along with being a funeral plan company that customers can have confidence in, Golden Charter now aims to adopt a wide range of new communication channels, such as web chat giving its customers the choice to communicate and connect in their preferred way.

KEY OBJECTIVES:

- **Migrate from a legacy on-premises system (Avaya)**
- **Integration with MS Dynamics**
- **Work within a PRINCE2 project management framework**



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