

# StepChange strides towards digitally enabled future with Genesys and Connect.



**CONNECT**<sup>®</sup>

**Step**Change  
Debt Charity

# Overview.

StepChange, one of the UK's largest debt advice charities, has continued to make major strides towards a digitally enabled future following the successful migration of its legacy contact centre infrastructure to a modern, cloud-based Genesys platform.

StepChange supports hundreds of thousands of people each year to take control of their finances and work towards long-term recovery. In 2024 alone, over 170,000 people completed full debt advice journeys, and more than 15,000 became free from problem debt.

"The people who come to us for help are often under intense pressure - financially, emotionally and practically," explains Chris Lovell, Contact Centre Service Delivery Manager at StepChange.

"Many are facing eviction, going without essentials, or dealing with the stress of constant creditor contact. Timely, accessible support can make all the difference."

However, growing demand and outdated systems were making it harder to deliver that support effectively.



# The business need.

"Clients were stuck in queues or dropped into the wrong teams. Advisors were spending too much time navigating systems and not enough time supporting people," continues Lovell.

Faced with end-of-life and clunky technology, the charity seized the opportunity to modernise its telephony and contact centre systems to improve service delivery and meet people where they are, whether online or over the phone, with faster, more flexible support.

Following a comprehensive evaluation, StepChange selected Connect to implement the first phase of its modernisation project – a Genesys Cloud Contact Centre as a Service (CCaaS) solution.

The migration was the first step to simplifying the client journey, starting with telephony to deliver clearer call routing, shorter wait times, and a better match between need and response.

Connect implemented a Genesys Cloud platform that integrated multiple functionalities, including telephony, call recording, WFM and analytics, into a single, scalable cloud-based solution.

"Migrating our telephony system was the most complex aspect of our digital transformation strategy, but the internal StepChange team worked well with Connect, leveraging a waterfall approach to successfully migrate in just four weeks, hitting all the important deadlines along the way," recalls Lovell.

Once implemented, the Genesys Cloud platform provided operational stability, delivering 100% uptime since launch, giving staff and clients a more reliable experience.

Crucially, the new platform laid the foundation for the second phase of StepChange's technology transformation project, which aimed to enhance all digital channels and bring the platform's full potential into play to create smoother, faster and more empathetic experiences for both clients and advisors.



# The solution.

The trust and confidence StepChange developed by working with Connect in the initial phase made the decision to continue with the managed services provider an easy one.

"Connect really helped our thinking in this phase through multiple face-to-face meetings and on-site strategy sessions, which served to ratify our thinking regarding our long-term vision and expanded the scope of the short-term tactical initiatives we planned to roll out in phase two," adds Lovell.

In this phase, the team shifted to an agile methodology, leveraging a minimum viable product (MVP) approach that focused on implementing digital channels that added the most value, rather than a big bang approach that invested in areas that offered a lower return on investment.

"Since we implemented the Genesys CCaaS solution, we've experienced how quick and easy it is to update and integrate new functionality," elaborates Lovell. "This was a major challenge before, with even simple IVR updates often taking months to implement."

The accelerated time to value means all stakeholders have now experienced the speed of change offered from the new model and have bought into it.

To streamline delivery, the StepChange and Connect set up a dedicated CX Value Stream, with agile teams working alongside frontline colleagues to improve journeys based on real feedback and data.

"This approach is supported by a growing level of internal expertise as more colleagues now have the skills to manage and adapt the platform, which means changes can happen faster and with greater confidence," continues Lovell.

These changes include the introduction of IVR-triggered SMS, which offered new clients a link to access support online during the call rather than waiting to speak to an advisor.

"This change had a significant impact, reducing wait times and pressure on phone lines, helping clients reach the right support more quickly while freeing up advisor capacity for more complex needs," explains Lovell.



Other impactful capabilities implemented included text-to-speech IVR, which allows same-day updates without technical dependencies, which helps the team respond faster to emerging needs and improve the caller experience without delay.

In addition, skills-based routing ensures people are matched with the right advisor as quickly as possible, improving both efficiency and care.

From a management perspective, integrated WFM has given advisors live access to schedules, quality monitoring and performance dashboards, which support more consistent coaching and feedback across teams.

Furthermore, flow outcomes, milestones, participant data, and wrap code insights all feed into an optimisation loop that helps identify friction points and test changes more effectively to support continual improvement.

"In this phase of the project, it is not a case of launching technology and stepping back. We now test and refine improvements in weekly cycles. Each improvement is grounded in evidence and focused on removing barriers, making the service more responsive and less reliant on one-off projects," explains Lovell.

In parallel, the organisation is also delivering email Integration, which removes the need for manual work allocation and improves visibility of client interactions; WhatsApp integration to expand reach and open up new contact options for clients who may prefer mobile-first channels; queue call-backs, aimed at reducing wait times and improving client satisfaction during busy periods; and an integrated knowledge base to support faster and more accurate responses from advisors.



# Outcome.

Since implementing these new capabilities, StepChange has seen a 60% reduction in misrouted calls into one of the busiest teams, following IVR changes informed by wrap code data, while improved regional call handling capacity helped one area manage 1,600 more calls per month through better routing and scheduling.

The introduction of IVR-triggered SMS led to a 61% increase in clients choosing to start online rather than waiting on the phone. Of those, 21% more went on to register successfully. Deflecting high-volume queries like payments into self-service channels has also freed up advisors for more complex support.

"Each of these projects supports our Transform Digitally strategic pillar, with a focus on access, responsiveness, and experience quality, elaborates Lovell.

"However, this approach is not just about adding new features. It's about building a more responsive, data-informed and resilient service that meets people where they are and helps them move forward with confidence."

Having worked with other charities before, Connect also understood the value that cost-effective pricing models could deliver and was able to get StepChange onto an hourly rate with Genesys, which has delivered significant cost savings for the organisation this year.

A wider rollout is planned for late 2025, including web messaging, which will offer more flexibility and allow clients to engage in a way that suits their preferences and availability, and a Genesys Agent Co-Pilot proof of concept, exploring how AI can support both client outcomes and colleague efficiency.

By placing client outcomes and user experience at the heart of its digital transformation, StepChange is creating a more responsive, agile contact centre operation, aligning with its mission to provide accessible, high-quality debt advice in an increasingly digital world.

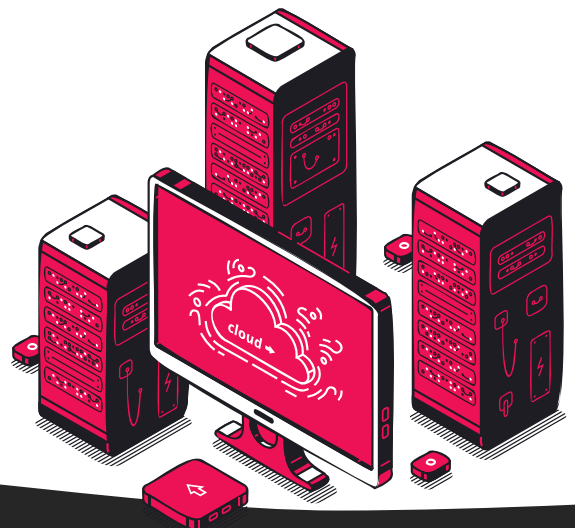
"Optimising the experience for both clients and colleagues is now an ongoing focus for us. Genesys Cloud has given the team the flexibility to make regular, meaningful changes based on real feedback and data," concludes Lovell.

# About us.

## About Connect

We're Connect, a global business communications expert with over 30 years' experience. We have a clear and simple purpose; to help people communicate better. We make this happen by powering frictionless journeys and providing secure networks that benefit organisations, their people and their customers, building towards a brighter, more sustainable future for all three.


By leveraging our expertise in CX and automation, we orchestrate connected experiences. And while we are trusted by many technology vendors, we're independent of all of them, enabling us to make the complex simple.




## Connect with us.

To discuss a communications challenge or find out more about our capabilities, get in touch with us today.

 +44 2070 751450 (UK) +27 10 476 0300 (SA)

 [info@weconnect.tech](mailto:info@weconnect.tech)

 [weconnect.tech](https://weconnect.tech)