

Customer First Summary Assessment Report

Organisation: The TCM Group

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Overall Performance Summary

Introduction

Since the last assessment in 2023, TCM has continued to evolve and adapt to meet client needs and improve its processes and services. It is clear that providing excellent customer services continues to be one of TCM's guiding principles

TCM's core values of Innovation, Collaboration, Excellence, Courage and Integrity are reflected in the organisation's culture, as well as being made visible to staff and customers. This is clearly evidenced through TCM's website content, as well as from communication channels with staff and consultant partners, through the corporate strategy, guidance and information materials.

Strategic priorities include many customer-focused objectives for example, *"We will ensure that the support that we deliver for our customers, colleagues and consultants is constantly evolving and we can rightly claim to be world class"*.

The last two years have been exceptionally busy for TCM, with a number of changes since the last Customer First assessment, including an organisational restructure, creating a customer success manager for each brand, moving offices and updated hybrid working arrangements. On top of this, business wins have included TCM's success with several tenders, both within the UK and internationally, proving that these changes are having a positive effect in helping to achieve the organisation's goals.

TCM has much to take pride in and celebrate regarding its accomplishments to date and it is clear that the organisation intends to continue to focus on providing a positive experience for both internal and external customers. TCM are holders of the Investors in People Silver accreditation, Safe Supplier Accreditation, and have won many awards including the HR Impact Award in 2024. TCM is also now an Institute of Leadership and Management approved centre. The organisation's success in delivering excellent services to customers is also evident from the repeat business percentage of 75%, as well as positive feedback from consultant partners, with comments including praise for the **"incredible team"** at TCM.

Customer Relationships

There was a significant amount of positive evidence to demonstrate the importance that TCM places on customer service and relationships, which includes the examples described below.

- As mentioned above, TCM have an excellent customer retention rate with around 75% of work resulting from repeat business. Developing and maintain good customer relationships continues to be at the forefront of TCM's strategic aims, one of which is **"to continue to develop and embed a culture of high quality service delivery and continuous improvement across the business"**.

- TCM have developed a series of zones within its online portal for customers, delegates and consultants. The Customer Zone is used to provide information and proposals to customers, which has been subject to a review in the last year with the aim of enhancing its potential impact at point of sale. The delegate and consultant zones have also been enhanced, with the Consultant zone providing access to resources, materials, branding documents, etc, and the Delegate Zone giving access to all required course-related documentation.
- TCM has been successful in developing new customer relationships since the last assessment, with the business winning several tenders, both within the UK and Internationally.
- The team uses Salesforce effectively to record and manage customer interactions, and for lead and project management. TCM's digital strategy has included a review to enhance the use of Salesforce and improve processes by making best use of the system.
- TCM has sought to improve relationship-building opportunities for its various brands by developing a website for each brand within the TCM Group, promoting the brand values for each brand, as well as delivering brand-specific information and news to customers.
- Organisational restructuring, which has been implemented in the last year, has included the introduction of a customer service manager for each of TCM's brands, providing dedicated support where required.
- Customer Success Managers spend as much time with clients as possible to help identify their issues, which helps inform the selection of assigned personnel from TCM's large pool of Consultants. All stages within this process are tracked and managed effectively.
- The Customer Service Team keep in touch regularly with clients through a variety of communication channels including the Customer Zone, but also through information sharing via social media and website.
- The team use Trello Board, an organisational tool, to help ensure customer projects are managed efficiently and successfully. A detailed project delivery plan is produced for the client. At the end of a project, clients and their consultants attend a project impact meeting to evaluate the project and provide an opportunity to discuss and evaluate the project, and a written report is produced and presented.
- Customer relationship initiatives include "Customer of the week", where TCM give £100 to the client's charity of choice upon the client being selected through a nomination process.

Market Awareness

TCM demonstrates an excellent level of understanding of the industry in which it operates and of what is required to create growth, the organisation has achieved through marketing activities, raising awareness of its brands and services.

- The latest version Corporate Strategy covers the period from January 2024 – March 2025. The Strategy is developed with input from the Board, leadership team, staff and consultants. The 2024-25 Corporate Strategy takes into account the 5 main pillars of activity: People and culture; Growth; Infrastructure and capacity; Excellence (quality); and ESG (environmental, social and governance). The strategy aims to assist TCM in delivering its purpose through its core values: Innovation, Collaboration, Excellence, Courage and Integrity, and to provide clarity around the organisation's goals and objectives for everyone within the business.
- TCM also have a Business Development Strategy in place, which aims to deliver the necessary drivers and enablers for growth. The plan covers all aspects of marketing and business development. Through communication of this, together with the corporate strategy, the team has been able to gain and apply a good understanding of the goals of the organisation and the industry in which it operates.
- In the last two years, TCM has created and launched a new PR, content and engagement strategy, which is aligned with TCM's corporate strategy and overall business goals.
- The TCM Ecosystem, which brings together the sub-brands of TCM, offering different products and services is now completed, and no new brands are due to be launched in the current strategic period. The team now continues to focus on accelerating growth through the optimisation the TCM Ecosystem.
- Every brand in the TCM Ecosystem now has a dedicated website and TCM undertakes a high level of SEO to ensure its websites are performing well and achieving their objectives.
- Marketing activities include the publishing of articles and thought leadership content in key publications globally.
- TCM has a strong social media presence, utilising various channels to develop brand identity and raise awareness of TCM Group's services and David Liddle, founder and CEO, is particularly active on LinkedIn. David is also currently writing his 4th book on Transformational Culture.
- TCM engage with industry peers and potential clients through events such as the 2025 CIPD Festival of Work, where TCM recently shared its latest innovations and insights including the AI-powered coaching companion, Pocket Coach GPT.

People

TCM's team includes 16 full-time employees covering a range of head office roles and around 100 freelance associates. TCM demonstrated how it invests in its people in numerous ways, including some of those described below.

- TCM has undergone a period of change and growth in terms of staff and structure, however there is continued emphasis on creating a positive culture to enable the team to reach both corporate and personal goals.
- TCM has restructured some areas of the business, with some people moving roles and taking on new responsibilities. For example, Lisajay Baker is now Chief of Staff (relinquishing office manager/admin roles) and Louise Webb has been promoted to Head of People and Transformation.
- The restructure has seen the creation of Customer Success Manager roles for each of the brands within the TCM Ecosystem, which has led to notable improvements in teamworking.
- TCM's system of hybrid, flexible working has continued to operate successfully since the last assessment, but the policy has changed in that all staff are expected to work from the office for 3 days each week.
- Recruitment processes have also been updated, with job applications now being managed through an online system.
- TCM ensures staff and consultants have plenty of opportunities to meet, discuss business and share knowledge and best practice. This includes:

Staff:

- Weekly whole team meetings
- Monthly CSM team meetings
- Monthly staff one to ones, which includes a review of objectives, corporate strategy, values and behaviours

Consultant partners:

- Monthly consultant partner meetings, used for checking in, networking, good practice, updates, etc.
- Quarterly support and supervision meetings, to discuss support needs, share good practices, and set new consultants up with a buddy.

"My buddy has been so helpful"

- TCM has a large pool of Consultant Partners, all of whom are highly qualified professionals within their field of expertise. Praise was given by the consultants interviewed during this Customer First assessment about the professionalism of the TCM team and the culture of the organisation.

“They really align with my values”

- The Consultants Zone provides access to all information consultants would need regarding TCM’s products and services, such as the latest templates, updates, etc.
- TCM has continued to invest in training and development for its team members, including training in Sales, Project Management and Cyber Security.
- Many staff have completed training in Mediation for First Aid, Mental Health and Mental Health First Aid and Workplace Mediation.
- An annual appraisal system is in place for all staff. Performance is reviewed and opportunities and requirements for development are discussed.

Summary

During the assessment, extensive evidence was seen which supports TCM’s continued accreditation against the Customer First standard. Despite not being able to include every detail, the assessor hopes that this report highlights the organisation's positive culture and how it uses its customer-focused strategies, operational processes and its dedicated team of people to achieve continuous improvement and an excellent customer experience.

The Assessor would like to congratulate everyone at TCM on their continued success and positive Customer First assessment outcome.

Assessment Outcome

TCM was assessed against the 30 Statements and was found to be compliant.

Assessor Quote

"TCM is committed to delivering exceptional service, addressing client needs, and fostering a supportive, positive culture where its team can thrive."

Breakdown of Assessment Performance

	Compliance	Partial Compliance	Non Compliance
<i>Customer Relationships Overall Score</i>	12		
<i>Market Awareness Overall Score</i>	11		
<i>People Overall Score</i>	7		
<i>Overall Score</i>	30		

Areas for Development Essential to Meet the Standard

There are no areas for development essential to meet the standard.

Areas for Continuous Improvement Not Essential to Meet the Standard

No non-essential areas for development were identified.

Outcome Sheets

Section 1 - Customer Relationships

		Compliance	Partial Compliance	Non Compliance
1.	We build successful long-term relationships with our customers	x		
2.	We identify our customer needs at the first point of contact with us	x		
3.	Where appropriate, our customers can access other relevant and related services through their contact with us	x		
4.	We clearly specify what our customers can expect from the service we provide to them	x		
5.	We deliver services to our customers in a timely manner or within agreed timeframes	x		
6.	The needs of our customers are reviewed appropriately during service delivery	x		
7.	Our people follow clear guidelines to select the most appropriate organisation to either contract with or refer to, in the best interests of the customer	x		
8.	Our people have access to relevant customer information that is accurate and up to date	x		
9.	We gather customer feedback to check the effectiveness of our service delivery and identify opportunities for improvement	x		
10.	Where appropriate, we follow up our customers after we refer them to others	x		
11.	We always follow up and swiftly resolve customer complaints or concerns	x		
12.	We evaluate, review and understand the impact our services have on our customers	x		
	Overall Score	12		

Section 2 - Market Awareness

		Compliance	Partial Compliance	Non Compliance
13.	All our people and those working on our behalf understand the purpose, aims and values of our organisation	x		
14.	We have overall business objectives that we measure and regularly review	x		
15.	We regularly review and identify the different needs of our customer groups	x		
16.	We keep our people up-to-date with the changes in our industry sector and other related service provision	x		
17.	We build successful long term relationships with other organisations for the benefit of our customers	x		
18.	Potential customers are carefully selected and targeted in any marketing activity	x		
19.	The introduction of every new or changed service is based on a clear rationale	x		
20.	We develop and improve our services by working in partnership with other organisations	x		
21.	We share knowledge with our customers and where appropriate, with other organisations	x		
22.	We set overall objectives for service delivery which we regularly review to ascertain how our performance affects our customers	x		
23.	We support continuous improvement – we are able to demonstrate that we learn from our experience and make improvements to our services as a result	x		
	Overall Score	11		

Section 3 - People

		Compliance	Partial Compliance	Non Compliance
24.	We ensure we recruit the right people with a customer focused attitude by using effective and appropriate recruitment methods in line with equality of opportunity principles	x		
25.	Our people understand their role within our organisation and are clear about what we expect from them	x		
26.	Our people have the necessary skills to effectively understand and meet customer needs	x		
27.	We use customer feedback to evaluate our peoples' performance	x		
28.	We regularly review and appraise our people to ensure that they are developed to perform their job effectively	x		
29.	Our people have training and development which is evaluated to ensure it has a positive impact on customer delivery	x		
30.	We act in the best interests of our customers at all times	x		
	Overall Score	7		