

REFRESHING CUSTOMER SERVICE POLICIES



NAICS #:
519110, 519130, 519190 541611, 541612,
541613 541614, 541618, 541720 561421,
561422, 561499 561110,
611420, 611430 611699, 611710

EMSDC MBE Cert PT01762
NJ-DBE October 2015
NJ MBE Cert #67001-10
NJ SBE: A0031-30

Cage Code: 70S13
Duns #: 078768502

Retaining market leadership through customer-centric service policies.

A leading financial services firm decided to refresh their customer service policies to better suit their current customer portfolio and market direction.

As a regulated financial services firm, the organization's interactions with customers, in-person and virtually, are dictated by multiple regulatory controls. The question at hand was how to maximize customer service while accommodating their regulatory and risk management commitments?

How do you support a customer's desire for you to be 'their advocate'? How do you define and implement their desire for you to 'be consultative'? How do you implement 'friendly' when you cannot, for regulatory reasons, satisfy their request? How do you define this in a way that can be scaled across your customer-facing organization and accommodate different customer interests?

In the three years since the competency model was implemented and incorporated AO was used by the board, leadership team and first level of company management to surface opinions on the subject and bring the three communities into alignment around changes to their service policies.

The organization possessed a wealth of insight into customer satisfaction, interests, preferences and attitudes. The alignment issue was how to meet their regulatory restrictions while providing the strongest, most efficient 1-to-1 experience. A core issue was the level of personalization that should be provided to the customer experience. The organization had built its position on efficient, low-cost operational excellence, which in many areas required a one-size-fits-all strategy.

The board, leadership team and managers used AO techniques to virtually and in-person discuss and select their policies for implementing greater personalization within their operations.

The three-prong plan of changes was endorsed by the board and built into their two year business plan.

CONSULTANT SERVICES:

Consultative: Creating a pathway in achieving your results with your business members input and employee observations of what is key for the benefit of your clients.

Advisory: Bringing diverse perspectives from unrelated industry operations and processes in seeking new opportunities in efficiencies.

Collaborative: Alignment optimizations delivers on a full spectrum of progressively engaging and impacting methodologies that deliver the results you and your clients expect.

KEYNOTE SPEAKER/WORKSHOPS

TRAINING & FACILITATION

COACHING & MENTORING

STAY CONNECTED



Ronald M. Allen
Managing Director

Managing Change, LLC



Cell: 609-247-2799

Office: 609-556-9816

Fax: 609-283-0217

website: www.RonaldMAllen.com

E-Mail: ronald@managingchange2.com

Aligning Performance Improvement w/Corporate Strategy