



CASE STUDY: Reinventing The Customer Experience



Background

Leading global financial services firm operating in over 50 countries. Over 170,000 global employees. Assets of \$1.4 trillion. Clientele includes large corporations, governments and wealthy individuals as well as small business, consumer and commercial banks.

Challenges

- Initiated a new branding campaign across the entire company
- Difficulty in implementing the new campaign at the retail branches
- Brand experience and brand positioning were incongruent
- Missing performance measures to evaluate brand performance within the retail locations

Approach

- Identify the core areas that need to be focused on: Branch Operations, Marketing and Customer Service
- Redesigned branch network to connect with ideal customer segments'
- Developed new branch concepts to better target desired customers
- Re-organized positions and processes to better align with customer needs within desired segments



Result

- Redesigned branch operations reduced personnel costs by 40%
- Created diagnostic tools to measure brand experience perceptions for retail branch customers
- Implemented measurement tools to continuously measure processes, roles and performance within each retail branch