

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

