

Case Study

This case study captures key issues and results for a leading FDIC insured federal savings bank offering customers traditional and innovative banking products and services through the Internet, telephone personal bankers (available 24 hours a day, 365 days a year), U.S. Mail and a nationwide network of ATMs. The featured bank has more than 100,000 retail customers, \$1.22 billion in assets, \$1.08 billion in deposits and more than 130 employees.

OBJECTIVES

- Create world-class customer service initiative to develop long-term relationships/improve retention
- Achieve bank-wide awareness of each person's role with customers
- Build teamwork and relationships by bringing teams together from two separate physical locations
- Establish a model and awareness of internal customer service

SOLUTION IMPLEMENTATION

Eight years ago, the Bank embraced The Customer® process as their initiative to become a more customer-focused organization. Five years ago, The Customer was re-introduced when the Bank decided to certify their own internal facilitators as active change agents. The Customer has been actively and enthusiastically endorsed by leadership with required bank-wide attendance for all employees.

The Customer is further energized and activated through the 12 points of the PRIDE pledge (the credo employees 'live' by at the Bank). These 12 tenets actively mirror the behaviors, skills and attitudes promoted in The Customer. Further emphasis is provided through the weekly, intranet 'World Class Corner' column featuring internal and external customer highlights. To ensure accountability, The Customer principles are incorporated into the Customer Service Balanced Scorecard and surveying of customer base. To further the accountability for Contact Center employees, The Customer is incorporated into the *Contact Performance Review* for use by leadership and the Quality Specialist to model and coach to the process.

IMPACT



- Enhanced teamwork across departments within the Bank
- Viewed as a valuable employee retention strategy which 'connects' employees to the Bank and other employees
- Increased understanding of the value surrounding internal customer service
- Maintained consistent customer satisfaction scores in the 90th percentile

*"The Customer® provided a unique perspective for how to better serve not only our external customers but our internal customers; leading to a more cohesive, teamwork oriented environment for Principal Bank."
-- Bank Quality Specialist.*

*"Employees who experience The Customer® process continue to marvel at how simple, yet powerful it is! They especially like walking away with the Problem Solving Formula and its ability to help them be successful in their job."
--Bank Training Manager.*