

+44 (0)845 838 2031



# Customer Experience

## A Case Study from T10



## **The organisation:**

A large successful regional building society made up of a head office, branch and agency offices throughout the province.

Staff and executive compliment in excess of c.550

## **The issue:**

'Member Satisfaction Survey' results were rated high at **4.475 out of 5** across a range of 20 survey metrics. However there was a feeling that the competition offerings were beginning to attract members away despite long standing loyalty levels and good member service practices. There was a need to stem the flow of members switching their accounts to another provider and to look at ways of building on the existing member service practices.

## **The research:**

A focused research programme quickly identified that member facing staff members were generally held in high regard by the members of the society with many being on first name terms. This has lead to many members introducing their family members to the society thereby 'keeping things in the family'.

The various branches looked and felt dated and somewhat worn. Attention to small details was clearly not evident hence the overall look and feel. The competition on the other hand continued to invest in their branch locations and were seen as 'clean – smart – current' by its customers. Even the competitor's staff uniforms appeared sharper, smarter and more up to date.

There was little money available to spend on a branch and head office revamp initiative.

## **The solution:**

After presenting the research findings to the members of the executive team the decision was taken to implement a programme designed to heighten everyone's understanding of the benefits of creating and then delivering a 'world class customer experience'. All staff members and members of the executive team were to take place in the programme.

The programme would focus workshop participants on;

- What a 'world class customer experience' looked, sounded, felt, smelled and tasted like.

- How the head office and branch network might benefit from undertaking a detailed assessment of each area of the branch and head office environment that members would come into contact with. Having then completed these assessments each workshop would then discuss and agree the top ten items that [subject to investment] they could implement on their return to their own workplace. Attention should be given to those 'quick wins' that would provide the greatest and fastest return on the investment required to implement.

- Using a series of detailed case studies each workshop were tasked with developing a business concept [outside of financial services] that could not only compete in its sector but would be seen by its customers as an organisation that delivers a 'world class customer experience' with the overall aim to quickly become the leading business or product or service provider in the sector.

- With all workshops completed the outputs from each event would be compiled into a 'wish list' so that each could be subsequently analysed and discussed in conjunction with the Operations Director who would then prioritise which of the outputs would be taken forward based on cost and return on investment.



## **The outcome:**

When all members of the staff and executive teams had completed their workshops a detailed set of outputs and recommendations were compiled and presented to the Operations and HR Directors. These outputs were reviewed and a detailed schedule of works was created in order to prioritise and then complete the various initiatives.

The initiatives and improvements to the branch environment and a range of customer touch points ensured that the next member satisfaction rating improved to **4.7** across the same survey metric set and the retention of member accounts improved along with the additional benefit of an uplift in new account openings throughout the branch network.

## **Cost of the programme:**

Research took the form of a number of visits to both branch offices and the Head Office to facilitate and gather as much detail as possible from a wide selection of employees to enable the design of the most appropriate solution and programme.

Research costs totalled £3,600

The design of the programme was completed in 10 days during which time the following materials were produced;

- Workbooks
- Presentations
- Case Studies
- Training notes
- Sensory video clips
- Management briefings

The design costs amounted to £12,000 [this did not include printing costs which were picked up by the Society.

Delivery of the programme took place on the Society's own premises. The catering and staff travelling costs were not included in the delivery costs.

Total costs for delivery of the programme amounted to: £31,200

The final investment per delegate to achieve the improvements across the range of survey metrics equated to £85 per member of staff. This was recovered by way of the improvements made in retention of existing member accounts; the additional new account openings improved the new business figures for the following year.

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Customer Experience by **T10**  
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London: Suite 34, 67-68 Hatton Garden, London EC1N 8JY

Midlands: 21 Smisby Road, Ashby de la Zouch, Leicestershire LE65 2JN

South: 83 North Lane, East Preston, West Sussex, BN16 1HD

T: 0845 838 2031

E: [mail@t10partnership.com](mailto:mail@t10partnership.com)