



Pioneers of *Effortless* Learning & Development



Case Study

About our client

A large regional building society within the financial services sector

Summary

'Treating Members Fairly' programme was designed to harness and capitalise on the strengths and advantages developed by the client Building Society.

Every member of staff took part in a 2 day workshop helping to bring alive the previous TMF workshops.

The programme enabled the business to enhance its status as a unique, home-grown, very positively perceived business in the province.

Designed in 2009 and rolled out over a series of workshops in 2010.

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The Issue and Briefing

Our client, a large successful regional building society, had identified that the competition offerings were beginning to attract customers away despite long standing loyalty levels and good customer service practices. There was a need to stem the flow of customers switching their accounts to another provider and to look at ways of building on the existing customer service practices.

The purpose of any programme was to harness and capitalise on the strengths and advantages developed by the client organisation since its launch. It further developed its service to customers, in this context it was not a question of size, but its quality! 'Customer Satisfaction Survey' results rated their service and products highly at **4.475 out of 5** across a range of 20 survey metrics.

The Solution

Working closely with our client we created a series of events designed to bring **treating members fairly** to life for the organisation. We built on all of the customer centric and regulatory training work completed to date. Commenced an anonymous survey among staff of their reaction to learning and application of the TMF courses completed by the organisation so far - either soft skill or task / T&C based. Undertook a 'trial assessment' of processes and levels of fairness displayed currently – a telephone survey of customers, brokers and those who have closed accounts recently.

The outputs were documented in a report which illustrated the evidence gathered vs consistency and standards outlined in TMF documentation. This provided us with the content and intensity of the programme. Next we collaborated with the organisation to scope and design the content for the audiences involved. We met with SMEs from the business who attended scoping meetings to challenge content and style.

A three stage approach was agreed to roll out the programme to every member of staff, top team, management team, concluding with a full staff roll out.

The Outcome

Having completed the programme and delivering a branded special experience for all customers has brought success and growth for the organisation through new customer referrals, existing customers buying more and staff loving their roles in representing the Brand. **Proud of being part of the organisation.....**

The client provided us with the following feedback - *"The unique training events led to high levels of participation and contribution from everyone that attended our 'Treating Members Fairly' programme. We saw positive outcomes immediately in our branch network following the training and we are implementing many of the excellent "service wish list" suggestions that were generated by our staff".* Sales & Operations Director