

Refresh, Call Center, & Support

Results achieved



Objectives	Actions	Results
<p>The COO's primary concern was the account opening process and in particular the protracted cycle time and high error rate. The objective was to restore competitiveness, improve customer service and enable the bank to achieve its growth ambitions.</p>	<ul style="list-style-type: none">Created a new Management Operating System designed to not only improve processes and employee behaviors but also improve the customer experience. This included a sales activity tracking system, a meeting rhythm and operating report to raise visibility of all sales activities, performance measures to monitor progress and an escalation process to resolve issues quickly.Managers and employees received behavioral models to better understand what was expected of them and how to carry out their position responsibilities.To embed the simplified process and new management tools, Alexander Proudfoot implemented a comprehensive training program for more than 1,000 managers.	<ul style="list-style-type: none">The new Management Operating System was installed at more than 1,000 banking sites and massively overhauled the account opening process, drastically reducing cycle time and rework. Moreover, the percentage of accounts that were opened correctly the first time (first time acceptance) increased by 142%.Employee performance rose because communication and coordination improved between departments, and employees felt more accountable for meeting daily performance numbers. A new sense of urgency and a unified mentality encouraged everyone to deliver quality customer service for the betterment of the company as a whole.Improved turnaround time from two weeks to less than 30 minutesReduced paper flow by 5 million documents

White Badge Bank

Fortune 500 bank with close to \$100B in revenue