

Multiple Channels | Creating Seamless Customer Service



Situation

A national financial services company was struggling to keep customer interaction consistent, productive and satisfying while serving its customers across multiple channels: online, ATMs, branches, mobile apps, and on the phone. A new channel strategy needed to be devised and implemented to enhance the customer experience, add functionality, and improve cross-selling. Each communications channel had a unique set of requirements all required dealing with fraud and authentication challenges and carried significant risk management concerns. Creating a consistent customer experience demanded a multi-channel initiative coordinated from a single point of view.

Solution

SolomonEdwards deployed a program manager (PM) who utilized proven best practices in program governance, risk management and program communications. Working closely with the business leads, the PM aligned all stakeholders with the strategic vision for a seamless customer experience.

Monthly dashboards, requirements definition, program communications, risk assessment and mitigation, and other planning efforts then followed, providing the client with the blueprint to advocate for the initiative across the entire enterprise.

Results

SolomonEdwards delivered the results the bank sought from this strategic initiative. Customers now move seamlessly across lines of business and modes of interaction. They can start a loan application on a tablet device, then walk into a branch office for a face-to-face conference to complete the process, or spot fraudulent credit card charges via mobile device, online, or in-person and get a consistent response from the bank regardless of how they report it. In addition to these process improvements, SolomonEdwards provided the client with lasting assessment and mitigation best practices that have changed how risk is managed across the organization.



INDUSTRY:

Banking



DEPLOYMENT:

Individual

SERVICES:



Business Transformation

Business Process Improvement

Project Management

Governance & Regulatory Compliance

Risk & Compliance