



CASE STUDY

# Partnering with a Financial Services firm



**Strategy:**

Deliver sustainable, profitable performance



**Group objective:**

Outperform market locally & globally



**Philosophy:**

Understand our customers' businesses

**Touchpoints covered:**

Account management	Product	Brand reputation
Marketing communications	Claims management	New business and renewals

**Goal: to be a more customer centric organisation**

- Established a customer and broker relationship measurement programme across four business units
- Identified strengths and weaknesses against customer needs and priorities using Action Planning Grids and through open ended specific examples
- Benchmarked against best in class and insight on differentiators
- Monitored delivery against the value proposition with a focus on consistency
- Delivered action planning workshops
- Secured commitment of leadership team
- Agreed business unit action plans

**Internal Stakeholder involvement:**

- External B2B commercial brokers and customers
- Internal core team including board level, communications and research
- Internal stakeholders – typically senior management and business unit heads
- MD of the Division

Harris Interactive Relationship Score Measuring and benchmarking strength of current and future relationship health

