



MODERNIZING A TOP-5 BANKING INSTITUTION'S CUSTOMER CONTACT CENTER

STRATEGY PRACTICE

BUSINESS PERFORMANCE IMPROVEMENT

Trexin specializes in leading our customers through challenging transitions, which is frequently related to operations optimization. Experience has shown that suboptimal business performance is caused by many factors, including:

- Ineffective governance
- Misalignment among business units or between business & IT
- Outdated business processes or ineffective process management

Trexin's Strategy practice leverages numerous diagnostic, analytic, and change management techniques to measurably improve business performance. Most importantly, we promote shared understanding and consensus through one-set-of-facts thinking, ensuring a solid basis for analysis & improvement.

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Trexin partnered with one of the largest domestic banks to perform an enterprise-wide contact/call center discovery and road mapping initiative.

BUSINESS DRIVER

After years of rapid M&A growth, a top-5 bank faced a fragmented and aging customer contact center landscape. As the bank switched to an organic growth strategy, the focus toward integrating the customer experience and tech savvy consumers illustrated the need for change. While the evolving contact center technology direction could support the emerging view of the future, the fragmented footprint and systems implied substantial planning complexity and daunting investment levels.

ANALYSIS & TEAMWORK

Our joint Trexin/client team conducted a structured, fact based discovery initiative utilizing contact center data, benchmarking, and Voice of the Customer (VoC) inputs. The work was organized into 5 stepwise phases driven by an enterprise work team (17 of 25 business lines) that performed the structured discovery work and participated in 3 alignment/analysis workshops. The discovery work included: 1) detailed and normalized data collection across 25 business lines revealing gaps/opportunities that resulted in 60+ opportunities, 2) industry benchmarking showing the bank lagged in several key operational and value metrics, 3) workshops and primary research that created numerous insights, and 4) detailed financial analysis and modeling of key metrics & benchmarks that drove a strong "call to action".

RESULTS

- **FACTS** - This work established a common fact base (cost, revenue, operations, customer satisfaction, and technology platforms) and future state for contact center capabilities/technology aligned with the emerging customer experience vision.
- **ACTION** - A stepwise enterprise road map was developed and is being implemented to achieve the vision. The bank's executive team commissioned a contact center detailed design and implementation planning effort to sustain the project's momentum. The detailed design confirmed the original work's success: 11 of 12 detailed recommendations have been initiated and included in the implementation plan.
- **ALIGNMENT** - The project's functional leadership group chose to sustain itself as an ongoing enterprise-wide contact center leadership community and is meeting monthly with an engineered and facilitated agenda.

"The price of success is hard work, dedication to the job at hand, and the determination that whether we win or lose, we have applied the best of ourselves to the task at hand."

VINCE LOMBARDI