

MODERNIZING A CUSTOMER CONTACT CENTER

Trexin led a large domestic bank through an enterprise-wide contact center discovery & 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.

APPROACH

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.

Discovery Initiative



Contact Center Data **Benchmarking** **VoC inputs**

Enterprise Team performs the discovery work, including:

- 1) Detailed and normalized data collection
- 2) Industry benchmarking showing a metrics lag
- 3) Workshops create numerous insights
- 4) Detailed financial analysis and modeling

CONTACT US

Financial Services Practice
fs@trexin.com
www.trexin.com