



COMPANY DESCRIPTION & BACKGROUND

A tier 1 bank is launching a digital banking platform that supports direct to customer product enrollment and account management. The operating model is transforming from a traditional broker-model to a digital platform that services direct-to-customer.

PROBLEM

With the launch of a new direct to customer digital platform, Sr. leadership requires a shift in strategic planning to focus on how the new digital banks contact centre will continue the level of customer service and sustain and/or improve upon their client experience.

CUSTOMIZED SOLUTION



Engage executive leadership to define the future-state vision of the contact centre for its people, process and technology elements.



Complete internal research and engage relevant cross-functional employees / stakeholders to deliver a current state assessment.



Analyze external factors and provide a detailed market research report with best-in-class examples to drive recommendations



Deliver detailed recommendations & opportunities to Sr. leadership that will enable them to deliver on the designed vision.

“ Working with the CSPN team was a true pleasure. The attention to detail and flexibility in managing our engagement was first class. The CSPN team brought forth unique concepts and industry knowledge that has helped educate our organization on emerging trends surrounding the customer experience. The final deliverables, which included helping to articulate our own organizations views on the customer experience were also enlightening. I believe any organization would benefit from the expertise CSPN brings to the table and I look forward to our continued partnership. - VP Operations ”

ENGAGEMENT APPROACH

ENGAGEMENT FOCUS

How IT infrastructure & systems within corporate contact centers can be built up to assist in delivering best-in-class customer experience.

PROJECT PHASES

1 Design Vision	3.5 Weeks
2 Current State Assessment	2.5 Weeks
3 Recommendations & Opportunities	3 Weeks

RESOURCES UTILIZED

1 – VP, 1 – Manager, 1 - Senior Consultant

CLIENT TAKEAWAYS

Vision Design-Structure Poster

Future-State Vision Summary

Current-State Assessment Summary

Recommendations & Opportunities Report

RESULTS

- Future-State design of the new Digital Contact Centre, including; IT Infrastructure and Systems, Operations and Human Capital elements required to deliver on the defined Vision
- Identification of where the bank is today on delivering best-in-class CX and education to the Executive team on CX Strategy & Design moving forward
- Tools and knowledge required to be a truly customer-centric organization. Empowered Leaders to make decisions quickly and confidently to drive a positive Customer Experience

BUSINESS IMPACT

STRATEGY

Leadership has the ability to make confident, informed decisions throughout the digital transformation by having a clear future state vision and knowing what gaps are impacting results.

FINANCIAL

Cost conscious IT purchasing and upgrading, Minimize non-value purchases and sunk cost when upgrading through clearly defined and designed transformation requirements.

PEOPLE

Increased engagement and buy-in from employees by having a clear understanding of how their roles and departments are effected. New role definitions and employee profiles outlined.

OPERATIONS

Clearly documented understanding of what operational supports need to be improved and/or integrated in order to support the digital transformation and CX goals.

TECHNOLOGY

The company has data-driven opportunities for IT infrastructure / systems required to meet CX goals. Vendor recommendations delivered to guide the decision making process.