



**Success Story:** Sales and Service Improvement

**Client Classification:** Large Government Owned Bank

**Service Category:** Change Management, Technology Enablement, Organization Transformation, Cost Transformation

**Situation:**

A major government bank with a distribution network of over 400 branches was seeking solutions to improve the quality of service being delivered to the customer. The executive staff at the bank cited a strong need for a proactive, sales-driven culture within the network and not one of a reactive nature with mediocre or no results, as what they were currently experiencing.

The Bank had been using consulting firms over the prior 4 years with limited results. The attitude in the organization was defeatist in that many of the business managers and staff believed that progress would be slow and results would be lost. Key obstacles included the paucity of formalized standards, a limited management process, and a slow decision process attributable to being a large government institution.

The bank realized that with the presence of foreign banks having a model of exceeding customer expectations and providing the best platform for elevation of the customer experience, the pursuit of sustainable change was irrevocable.

The branch network was characterized by a tired look and unmotivated staff. The branches needed to be updated and new life was needed to bring the bank back to its successful roots and move forward towards useful technologies to manage service and sales. Customers needed to see improvement and recognize the bank as proactive.

**Recommendations:**

LoBue focused on the branch network and the centralized supporting functions to capitalize on a large distribution system.

- Process re-engineer, rationalize and re-purpose the branches with a focus on the Customer Experience
- Install a Service Management Program with the aim of quantifying the level of service(s) being delivered to the client
- Define the levels of service given to the client based upon best practices and customer expectations
- Install a wholesale program of Branch Sales by instituting a system based upon results and accountability
- Re-align back office staff within the branch to become customer facing staff
- Move credit and operational activities out of the branches and define an efficient and effective new process in a centralized environment.

**OFFICE LOCATION**

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- Re-configured the current layout of the branches, to enhance and compliment many of the behind the scene changes

**Results:**

A wave of change and a new approach to service and sales brought many benefits including:

- A systematic service and sales management process
- Clearly derived and communicated levels of service
- Instilled sales culture amongst all levels of staff resulted in 117% increase in retail sales
- Changed the makeup of the Branch staff, increasing the number of customer facing staff from 52% to 81%.
- Decrease in customer waiting time by at least 20%
- An enhanced customer experience, shown with actual results from customer feedback
- Improved efficiency in back-office functions ranged from 20 – 40%