



TRILLIUM

SUCCESS STORY:

## Banking Firm

*Engagement: Customer Service*

### Trillium Helps Banking Firm Improve Customer Recognition and Retention

Trillium was contacted by a large banking firm that was having issues with customer recognition and retention. These issues caused the Client to seek outside assistance in reviewing and improving its customer service offerings and application, to help determine a new, standard approach moving forward.

**Challenge:** *The changes in personal banking/wealth management clients were causing back office issues as well as issues with customer recognition and retention*

Trillium's Client experienced changes in its personal banking/wealth management customer areas. This created collaboration issues with both back-office systems and the people responsible for supporting them. In addition, the Client was having difficulty converting prospects into the clients and identifying new business opportunities with existing clients. Their systems limited their ability to proactively stay in touch with existing customers, and, also could not adequately identify prospect customers or new businesses to target. It was evident that while the bank had made significant investments into technology, there were gaps

#### Our Client

***A Major Banking Firm***

#### The Challenge

The Client's issues surrounding customer recognition and retention

#### How Trillium Solved It

Trillium assessed the current customer service approach, performed a requirements analysis, and implemented a new service management platform for marketing and consumers

#### Results

Deployment of a cloud-based application for current and prospective customers

Reduced paper usage by over 40% in back office

Ability to reach all necessary contacts in a secure environment

Updatable process mapping document streamlines Client's change process

# Banking Firm

## Engagement: Customer Service



in understanding, integrations, and analytics to meet the needs of current customers and identification of new customers while also considering banking regulations.

**Trillium Solution:** *A current state roadmap of customer service, followed by process, procedural, and technical solutions to improve the customer experience and help the bank market to new customers*

The Client engaged Trillium to review and assess its customer service processes and technology and recommend a path forward. The analysis included:

- Creating a current state roadmap of customer service, documenting key customer service business objectives and process and technology gaps
- Analyzing how technology was supporting the client's business objectives
- Developing a roadmap to support the going forward approach to addressing the identified gaps
- Generating use cases and requirements for a new customer service platform, identifying the necessary integrations with back office systems

Outcomes of the assessment included:

- Deployment of a cloud-based customer service application for our Client's customers
- Development of a communications plan to support the marketing goals for the client
- Streamlined and more effective collaboration between banking/wealth management employees
- Documented process maps simplified ongoing process and procedure changes

**Results:** *Introduction of the new customer service platform resulted in paper savings, added efficiency, and updated processes*

Trillium's Client was helped by proactively addressing the customer service environment and introducing a new platform and processes. Results included the following:

- Client gained the capability to market to prospective customers and improved conversion rated by over 50%
- Reduced paper usage by over 40% in the back office
- Significantly improved collaboration capability with personal banking/wealth management customers in a secure environment
- Process roadmap became an updatable document to use moving forward as processes are added or changed

The project allowed the Client to update processes with its new cloud-based platform with a sound foundation for the future.

### About Trillium

Trillium Solutions Group, Inc. is a professional services firm headquartered in Chicago that provides technology consulting and strategic sourcing services for industries such as trade associations, financial services, legal services, utilities, telecommunications, and healthcare. For more information, please visit [www.trilliumsg.com](http://www.trilliumsg.com).