



## Banking case study – helping customers work more efficiently

### Our client's problem

*We know that well organised, up to date businesses perform better – so how do we help our small business customers improve the way they work?*

#### Approach

Privacy issues were central to how we approached this challenge. The bank's customers were time-poor, concerned about sharing information and reluctant to reveal weaknesses in how they work.

Senior directors with FS and B2B experience conducted all interviews to make sure the bank was represented professionally.

One to one interviews in the work place gave privacy to customers whilst allowing our researchers to witness working practices first hand.

Customers were given the option of whether to be recorded or not to create a trusting environment and open discussions.

#### Outcome

- Clarity about which aspects of business life our banking client has license to influence
- Customer pen portraits to guide training and communication strategies
- Roll out to larger businesses to establish full thought leader positioning within the industry.
- Commitment to help small businesses on specific issues integrated into customer charter

