



# Make the difference with Client Service

**Replace client at the center of your organisation!**

2017



BANQUE - FINANCE - ASSURANCE – PROTECTION SOCIALE

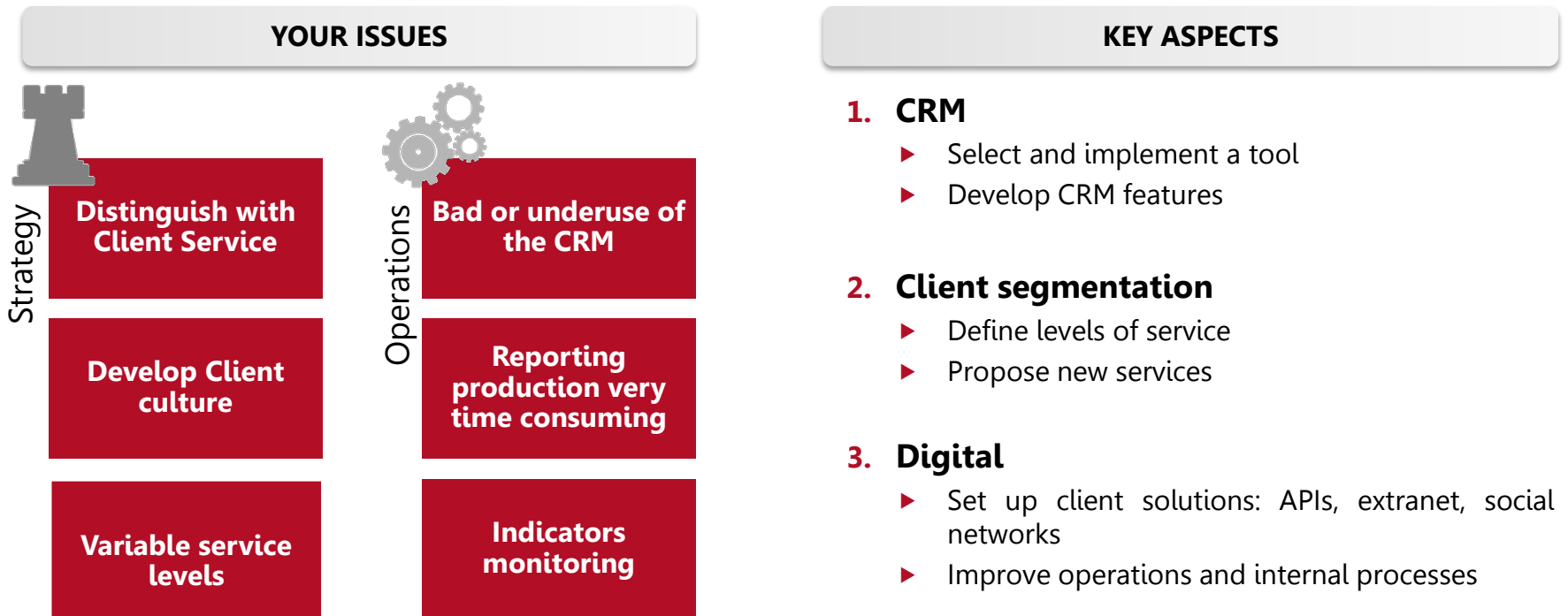
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# Make the difference with Client Service

## Challenges

### CONTEXT

- Clients are more and more sensitive to Client Service key indicators: time and quality
- Clients are expecting digital processes and seek for autonomy



## Périclès Group is helping you to take your Client Service to the next level

- ▶ Develop employees' commitment by setting up a client culture in teams, engaging and federative for all the organisation

# Make the difference with Client Service

Our approach: customised supports based on your objectives and the diagnosis



## Activity diagnosis

- Interviews and workshops with identified stakeholders on the aspects:
  - ▶ Clients
  - ▶ Proposed services
  - ▶ Client Service position in the organisation
  - ▶ Team organisation
  - ▶ Tools and processes



## Definition of an actions plan

- Recommendations and presentation of an actions plan
- Proposition of a package for support and follow-up
  - ▶ Implementation organisation
  - ▶ Workstreams management
  - ▶ Actions follow-up
  - ▶ Project steering



## Processes optimisation

- Description of processes to redesign
- Identification and set up of areas of improvement based on Lean approach (quick improvement)
- KPI definition



## Client segmentation

- Analysis and definition of profiles
- Organisation of segmentation and corresponding service level
- Considerations on service offering



## Digital strategy

- Target definition
- Digital diagnosis of the organisation
- Identification of priority areas
- Scoping and planning of the transformation project



## CRM

- Carry out a RFP for tool selection
- Set-up of selected solution
- OR
- Writing of new features specifications

ACCORDING TO PLAN ORIENTATIONS

### CLIENT SERVICE OPTIMISATION

- **Client:** Asset Manager
- **Timeframe:** 3 months
- **Result:** definition of target organisation, writing of procedures, actions plan and planning of findings for the set-up of each stream

### CRM SELECTION AND SET-UP

- **Client:** IFA
- **Timeframe:** 9 months
- **Result:** writing of specifications requirements, management of the tender and steering of implementation works of selected tool

### DIGITAL ROAD MAP DEFINITION

- **Client:** IFA
- **Timeframe:** 2 months
- **Result:** evaluation of company digital level and definition of a global projects : client relation, data management, operations, ...

- ▶ **Knowledge of business state-of-the-art and capitalisation** based on our annual studies and our missions for major actors in Asset Management and Insurance
- ▶ **Help business progress** with our various participations in professional events, writings on businesses evolutions and our position towards different actors in France, Luxembourg or Switzerland
- ▶ **Know-how in operational excellence and on organisations transformation** based on Lean and Lean 6 Sigman methodologies
- ▶ **Expertise on selection and support in setting-us services solutions** completely independent from services or softwares providers