

# \$30m Financial Services CRM Transformation

Reengineering customer service processes, technology and organisation across a major financial-services group

## The Challenge

A Top-10 Australian banking, insurance and financial-services group faced fragmented customer service, products, new-business processes and technology.



### AT A GLANCE

**\$30m**

*Implementation budget*

**Australia**

*Banking & financial services*

**2 years**

*Transformation programme*

## Our Approach

- **Business Analysis**  
Analysed account-holder service business units, processes and systems.
- **Operating Model Design**  
Designed new processes, skills, technology and organisational architectures.
- **Performance Management**  
Developed a new balanced-scorecard framework.
- **Transformation Delivery**  
Designed the PMO framework and led the two-year implementation programme.

## Outcome

Operational efficiency savings exceeded 45% from baseline, with customer-service and cost performance brought into line with industry benchmarks.

### Experience Across the Journey

