



IS YOUR COMPANY

CUSTOMER ATTUNED?

TRUST >

Dr Mark Hollyoake

WHY IS TRUST KEY IN FINANCIAL SERVICES?

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The financial services sector shows no signs of slowing down, a lack of challengers, disruptors or a change in its highly competitive nature. At the heart of this sector is a requirement to trust and be trusted - this sector needs to have trust embedded as its DNA.

The end customer is paying a premium, or investing, for a 'paid for promise'

- Insurance: Until a claim is made
- Wealth: until retirement or draw down

Therefore, much of the relationship focus revolves around the paid for promise. Providing a reassurance that your money is safe with us - either to deliver the growth rates necessary to secure your retirement or investment return; or swift payment and prompt service to cover a claim.

The relationship is based around intangible trust at this stage and it only tips into tangible 'active' trust when the promise needs to be paid. So, the dilemma for this sector is the development of trust when much of the relationship remains intangible or in that intentional state. This is why it makes it important that there is trust in financial services ...

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Peter Lavers

PLAYBOOKS IN CUSTOMER EXPERIENCE

In Peter's role as a consultant and adviser to companies across sectors, he is increasingly coming across and hearing about the utilisation of playbooks in customer experience management, that bring consistency and alignment to programmes and campaigns ...

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VALUE >

David Brown

HOW WELL DO YOU MANAGE CUSTOMER VALUE?

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In the insurance and wider financial services sector, the concept of customer value is growing in profile all the time. This has come about mainly, though not exclusively, as a result of increasing focus on the subject by the industry regulator, the Financial Conduct Authority.



Customer Value Management is under the microscope in two ways:

Firstly, products and services themselves. Secondly, as a result of the intermediated insurance model, focus is also on value in the distribution chain. Which begs the question - how well do you understand and then manage customer value in your company?



DAVID BROWN JOINS THE TEAM

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We are pleased to welcome David to the team! David is an experienced business development & strategy leader, having operated at senior level in developing businesses for 4 major insurance and financial services companies. He has run large regional operations around the UK, delivering profitable growth for each.



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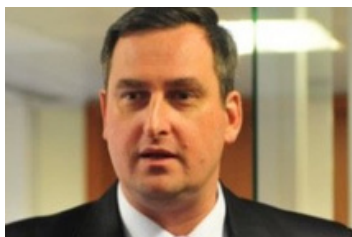
DR MARK'S VIRTUAL TEA TIME CHAT

Dr Mark sat down for a virtual coffee with Andrew Hough, CEO of The Institute of Sales Professionals.

"It's the initial marker of trust for buyers to go down the sales journey together"

With 7,000 members across 84 countries, Andrew has seen a huge shift in behaviour, increased customer satisfaction and an uplift in economic performance.

[Watch the chat here.](#)



Andrew Hough, CEO,



Institute of Sales Professionals

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www.customerattuned.com

MANAGING >

Alan Thompson

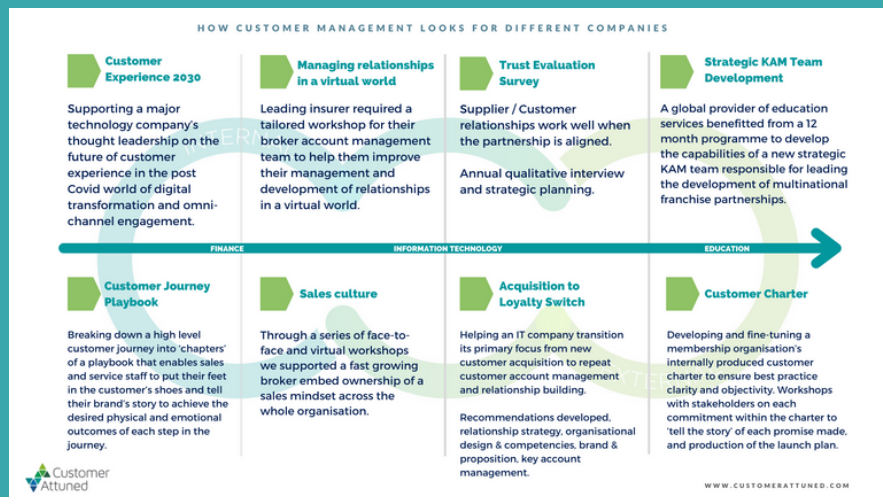


NO GOING BACK

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Let's face it, there is no going back to the old way we are used to in how we manage our customers and partners – the world has changed and we need to embrace the use of the hybrid world that has emerged as a result of the pandemic. As we come out from two years of work and life disruption, one thing is certain – managing customers and partners isn't going to be the same again.

CENTRICITY >



ADOPTING A CUSTOMER CENTRIC CULTURE DEMANDS ONE THING

Paul Cranston

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These projects illustrate the ways that that customer centricity is relevant across the business - companies that start with developing a Customer Charter move to implement a customer centric sales culture, then expand in to Key Account Management development and even into strategic partnership evaluation and development, and the journey continues.



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Peter Lavers

SIX LENSES OF BEST PRACTICE FOR CUSTOMER CHARTER DEVELOPMENT

Customer charters can play a key role in manifesting your wider brand promise into concrete standards and commitments that you are happy for your customers to judge you by. In hundreds of engagements in all types of businesses and sectors, we have seen a lot of customer charters, propositions and promises!

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