

Elevating a Product to a Superior Service Level

The Challenge

A leading global financial services company sets itself apart from competitors through remarkable service to elite cardholders across the world.

However, the methods used to earn that stellar reputation were inefficient, stalling their growth and causing them to overlook ways to engage and delight their most valued customers. They needed help upleveling their CRM platform to deliver the service they had once been known for.

To achieve this goal, they partnered with Tallwave to understand system users at a deeper level, to centralize their information, and to provide a streamlined workflow.

The Approach

Tallwave used the following approach to rethink their product development lifecycle and build a platform that enabled a white-glove service to cardholders:

- Define needs, radical collaboration, rapid prototyping, and continual testing
- Working sessions with their production team, subject matter experts, and leaders across divisions
- Agile planning to create, validate, and launch an improved customer experience

The Results



Improved

communication between agents and cardholders



Proactive

approach to servicing cardholders' needs with more personalized cardholder information



50%

cost reduction compared to original budget