



Results you can take to the bank

A financial institution with over 400 locations wanted to measure their outbound calling programs where bankers were required engage current customers and suggest new products and services, such as new checking accounts, loans, CDs, and other products.

They suspected, however, that these calls were not being made consistently, despite the reports in their customer relationship management system—but they had no way to prove it. Reality Based Group™ (RBG) was tasked to research, design, and implement a customized resource that could measure the effectiveness of their call program.

Recording the Calls

RBG's response was to build a browser-based solution that requires NO hardware or software investment from the client while allowing the bank to document the calls with generated .wav sound files reviewable by management and professional coaches at RBG. RBG coaches would then listen to the calls, score them based on pre-defined criteria, and develop a baseline report where the results could be reviewed directly with management and staff to determine areas of improvement.



Accountability Metrics

Initially, the bank saw a spike in call activity—mostly because they had informed the employees about the new system. Over time, however (and to no one's surprise) the call volume started dropping off and the activity proved to be inconsistent with what was being reported in the CRM system. RBG's tools were able to pinpoint the issue—their middle management executives were not following up appropriately with staff to ensure that the calls were being executed, and they stopped reviewing the calls for improvement opportunities. Upon solid evidence of the break down, the bank was able to implement a new training and accountability program uniform across all of its locations and sales of new products began to improve.

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