

CIS Case Studies: Competitor Benchmarking – ‘Best in Class’ Account Management

Benefit to Client:

Assessment of ‘best in class’ account management processes in a specific segment of the banking sector. Key learnings around account management processes, customer segmentation, call centre and bank manager roles and responsibilities, and SLAs.

Client Need:

Our client was looking to benchmark its own account management structure against key competitors in the industry in order to align its own model to the industry ‘best in class’.

Approach:

CIS conducted an in-depth benchmarking of key competitors’ account management processes and procedures, reporting lines and structures, roles, responsibilities and autonomy of key job functions, as well as future strategy in the specific segment.

Methodology: Secondary intelligence gathering, mystery shopping and telephone-based primary intelligence gathering, local branch visits, benchmarking analysis

Solution:

Utilizing the intelligence gathered, CIS was able to make recommendations to the client in terms of:

- ‘Best in Class’ processes and models
- Key industry success factors
- Key competitors and potential future threats
- Client strengths and weaknesses vs. the competition
- Expected changes to competitor model based on analysis of competitors’ future strategy

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