

## Aubyn's Case History *Vignettes*

### Customer management and other strategic consulting

#### Most recent work as an independent consultant and associate

- **2005-2006 – Commercial and organisational due diligence.** On behalf of a private equity company preparing to invest in the administrative services sector. Investigated marketing, customers, channels and customer service, as well as operational contact centre operations and organisational and cultural issues.
- **2005 – research, facilitation and advice to identify future strategy.** Working with the leadership team of a specialist unit within the DfES to identify emerging challenges within the education system and options for how they adapt to meet them. On-going advice on how new commercial approaches to leadership, learning and change could be of value within an educational context.
- **2004-2005 – Market facing strategy for IT hardware and services vendor .** Working closely with a client team to develop a business growth strategy encompassing markets, customers, channels, customer management and market facing operations.
- **2003-2004 – change programme diagnosis, design and implementation for UK bank.** Working closely with the change programme director to design and implement a critical organisation wide engagement programme to bring about behavioural change in support of new strategy and brand repositioning.
- **2001-2002 - Change management to enable rapid business growth.** Worked with a small insurance company on creating the cultural conditions for growth and helping bring about structural changes. Helped the organisation through the transition following change of parent company.
- **1999-2001 – Worldwide Organisational Transformation Programme.** Diagnosis, design and implementation of a customer focused transformation programme that encompasses the worldwide operations of an international insurance group. The scope of the programme included; organisational re-structuring, culture and people development, sales channel improvement, systems and business process development, service quality improvement and the implementation of CRM strategies. This has involved the design and delivery of a CRM Implementation Manual. Subsequent change management workshops have addressed departmental definition and inter-relationship, management development, team building and CRM strategy tailoring.
- **1999-2000 – Strategy review and change facilitation.** Leading a strategic review for the Pan-European call centre operation of a major car manufacturer, by guiding internal specialists and the call centre management team. Key issues included competitiveness, service design, internal customer relationships, structure, access and resource strategy, service quality, customer learning systems, internal communication, culture, change and organisational development. The strategy initiation process involved facilitating team building workshops at senior and middle management levels. The review was part of a broader programme that resulted in productivity increases of more than 40%.
- **1999 – Contact centre vision and strategy development.** Developing the vision and strategy for a UK bank's direct mortgage division, working with the management team as well as all levels within the call centre operations. Creating a virtual call centre from four disparate operations and identifying strategies for increasing productivity by more than 50%.

### **Some example case histories with Merchants (1990-1999)**

- Business growth strategy development and implementation for enterprise software supplier; organisational re-structuring, new channels and new marketing technology, techniques and operations
- Customer services improvement planning for mobile communications supplier: reduced costs by 20% and improved quality through changes within systems, processes, people and structure
- Design of blue print for a new direct operations and call centre strategy for Europe covering marketing, sales and customer services activities, for a major IT vendor : common infrastructure and best practice implemented across previously disparate country operations
- Design of new direct selling call centre operation for mobile communications supplier: became largest single new customer channel, with customer acquisition team outperforming conversion targets by 100%
- Designed major VAR marketing support programme for hardware vendor, involving on-line database access, marketing training and business consultancy support: delivered business generation capability to a whole network of VARs
- Marketing training and cultural change programme for major IT vendor: transformed the group's understanding and application of marketing
- Customer relationship management strategy and design of new customer facing teams for major UK bank: increased the productivity of sales people and reduced cost of appointment generation
- Marketing department review and re-design for treasury department of major UK bank: created a market focused structure that is growing the banks income
- Business modelling, business case analysis, customer management strategy development, change strategy and facilitation for mail services supplier: set up a new customer management call centre operation supported by new database and tele-business systems, has led to doubling of revenues and profits through direct communication with customers
- Facilitated the vision for a World-wide Customer Database and Customer Management Strategy for an International Express Delivery Company. Subsequently developed the top level business requirements document for new systems, working with over thirty managers in eight countries