

Case Study – New Proposition Design and Launch

Our client, a FTSE Wealth Management Firm, were exploring the possibility of the launch of a new hybrid advice proposition.



The Challenge

- Our client engaged with us to develop a pilot Client service Proposition including operational processes, selection of technology providers and the design and implementation of an operating model.
- We agreed to use our experience and expertise to develop and launch the new proposition for the targeted client segment to validate the clients proposal.



Our approach

- We initially agreed with our client to introduce a number of resources with previous industry experience in the launch of new client propositions.
- We then proposed the design of the end-to-end client journey mindful of the client requirements for speed of delivery and use of existing technology and systems architecture.
- As part of this we documented and agreed the data design of the CRM system and integration of this with the existing IT infrastructure.



Our Impact

- With a history of delivery of similar projects, our client approached us to advise on this proposition pilot as they viewed our input as critical to the propositions success.
- The use of consultants with significant experience enabled a relatively small team to define and build end-to-end client servicing capabilities with full operational processes to support this new proposition.

- Finally, we supported the internal resources to obtain client Executive Committee agreement of the pilot operating model and advised on the implementation to ensure efficient and effective adoption across multiple business functions.