



# CASE STUDY

## OPERATIONS: SATISFACTION SURVEYS

**Client Industry: Financial Services**

### **BUSINESS CHALLENGE**

A large pension fund wanted to determine its level of customer satisfaction in order to change key business processes to make the client interaction process more amenable for the customers.

### **PSP ICON APPROACH**

By jointly determining what the questions should be per various category, PSP Icon launched a small call centre and conducted a 3 week phone survey. Over 800 customers were contacted and the results were analysed per fund category.

### **RESULTS**

The Pension Fund was able to make strategic decisions about how best to market its products (demographic characteristics) as well as identify bottlenecks that negatively affected customer opinion.

Key processes were identified that were to be re-engineered to make the business more responsive.

Ideal communication methods were recommended per Fund sector so as to enhance the client-centricity focus of the Fund.