

GROW your entrepreneurial community

Profound relationship building for one bank

...with 300 of its highest value customers

A REGIONAL BANK OVERHAULS GLOBAL COMPETITORS BY HELPING TO ACTIVELY GROW ITS BEST CUSTOMERS - NOT JUST FUND THEM



GROW

When a regional bank decided that, to create a real point of difference in the market, it needed to do a lot more than just pay lip-service to the idea of 'strategic partnership' it had built its reputation in the SME market upon, it turned to the partners of Contexis for help. The solution was radical. And the impact dramatic.

The idea was for the bank to behave like a genuine business partner to its high-value

clients and not just a bank. That meant the bank had to support customers with world-class strategic advice. Its job had to shift to actively growing key customers' businesses and not just funding them.

Supporting customers with world-class strategic advice set this bank apart from its global competitors

300 high-value customers receive a tailored growth plan

This programme involved an initial tranche of around 300 high-value customers. Each received an in-depth diagnostic to identify key strengths and weaknesses in the business model. This analysis was undertaken with the active participation of the Relationship Management team from the Bank.

“My fellow directors and my non-executive director were amazed at this service from the bank”

The client received a significant insight into their business and a tailored Growth Plan which all of the participating CEOs found highly valuable.

“Really useful tools to have for a business growth conversation with my bank manager”

Deeper relationships based on a profound understanding of their business

By working with their client CEOs in this intensive way, the Bank formed a dramatically deeper relationship with, and a far more profound understanding of, their high-value customers.

“I have learned so much more about my client”
- Relationship Manager

This understanding had the effect of revealing significant new lending opportunities across the bank's portfolio. Quite apart from the dramatic increase in loyalty reported by customers and Relationship Managers - and the referral activity that has resulted - this additional lending will compensate the bank several times over for its far-sighted investment.

“I have told at least 3 other companies what the Bank has done for me through this programme”

Going forward... business clubs create community around bank

The next stage of this ambitious programme will involve the bank offering further growth support in terms of business growth initiatives and business clubs to develop a community of fast growth regional businesses.

“The programme has been the catalyst to get me to this stage - I probably wouldn't have got to where we are now heading without it”

conversation?

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