



How We Helped a
Financial Services
Corporation Run
**SUCCESSFUL
CAMPAIGNS**



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Founded in 1955 in Toronto, Ontario, Bill Gosling Outsourcing began as a traditional accounts receivable management company. Since then, we've expanded into the United Kingdom, the United States, and the Philippines, now operating eight offices worldwide. Made up of almost 2,000 people across four countries, we develop customer communication solutions for every part of the customer lifecycle, from beginning to end.

Our client is a provider of credit cards, charge cards, and travel and insurance products. Businessweek and Interbrand ranked our client as one of the most valuable brands in the world, estimating the brand

to be worth over US\$14 billion. Fortune listed it as one of the top 20 Most Admired Companies in the World.

Our partnership with this corporation, which has spanned 16 years, is comprised of three main channels that offer products and services to consumers, small & medium businesses, and corporations.

While our client is a large player in this market, other financial services corporations are also firmly entrenched in the market. Conversions are a critical piece of strategies to increase market share.

THE PROBLEM

- As the offering of credit grew in Canada, financial service providers became more aggressive with their marketing strategies to grow their brands and customer base. With this, offer-based promotions became the primary marketing method to increase market share. Within the corporation, each channel developed their own unique strategies to promote each product line, often without collaboration with other channels.
- As outbound calls to prospects and customers increasingly focused on promotions, we began making multiple calls on behalf of the different channels to each customer, sometimes resulting in customer complaints.
- Promotion based calls resulted in an immediate increase of card sales, but did not build brand loyalty—customers left for the next best offer after the promotion had concluded.



OUR SOLUTION

- **THE BENEFIT OF EXPERIENCE:**

Based on our thousands of customer conversations over our 16-year partnership, our team identified the trend and recommended a solution based on selling “value” rather than individual promotions.

- **CONVERSATIONS AND ANALYTICS:**

We modified our systems to capture information throughout our team’s natural conversation with the customer, documenting their feedback, buying habits, and what key competitors were doing. This information was categorized into quantifiable information to help inform future strategies. We then consolidated learnings from our client’s multiple programs to provide a single combined overview.

- **INCREASED CONSULTATION:**

Working together, we scheduled a collaborative cross-channel business review to share learnings and best practices. Recommendations were made to evolve strategies from promotions-based to value and consultative-based.

- **ADAPTIVE TRAINING:**

Based on our extensive experience building client-specific training programs, we created new training strategies that emphasized learning about the individual customer, rather than purely focusing on one-size-fits-all promotions.

- **FEWER CALLS, HIGHER RETURN:**

We suggested further multi-layered strategies and collaboration across departments to reduce call volume, covering only the promotions that made sense for each customer on a single call.



BENEFITS

Simply put, the benefit is a continued consultative strategy to conduct fewer calls, create a better customer experience, grow customer brand loyalty, and increase the return on investment for the client.

Ongoing collaboration allows our teams to reduce the number of calls made to customers, and increase the value of the call to the customer. More deals will be closed, long-term customer spending will increase, and the customer will have a much more constructive experience with our client.



BILL GOSLING

Bill Gosling has the technology and resources to help your business provide better customer service. With over 60 years of experience in the contact center industry, we've learned that what matters most is how your brand gets where it needs to be.

Our dedicated team will work with you to create your brand's strategy for providing great customer service experiences. We work with financial institutions, telecom companies, charitable organizations, roadside assistance companies, the healthcare industry, and more. No matter the challenge, our team will work passionately to build the right solution for you.

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