



## Tanfeeth Removes Silo Mindset, Improves Customer Satisfaction

Tanfeeth

Best Learning Program Supporting  
a Change Transformation Business Strategy  
February 2019



### Company Background



<b>Headquarters</b>	Dubai, United Arab Emirates
<b>Year Founded</b>	2011
<b>Revenue</b>	\$364 million
<b>Employees</b>	2,800
<b>Global Scale (Regions that you operate in or provide services to)</b>	UAE, Egypt, Singapore, Saudi Arabia, and UK.
<b>Industry</b>	Banking and financial services; shared services.
<b>Website</b>	<a href="http://www.tanfeeth.ae">www.tanfeeth.ae</a>

### Budget and Timeframe

<b>Overall budget</b>	5,000 AED (approximately \$1,500).
<b>Number of (HR, Learning, Talent) employees involved with the implementation?</b>	2
<b>Timeframe to implement</b>	Three months
<b>Start date of the program</b>	2016

## **Business Conditions and Business Needs**

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Emirates NBD Group is a leading banking group in the Middle East with operations in the United Arab Emirates, Egypt, Saudi Arabia, Singapore and the United Kingdom; the group has 445 billion AED (approximately \$121 billion) in assets under its management. Tanfeeth is a wholly owned subsidiary of Emirates NBD Group. Meaning “getting the job done” in Arabic, Tanfeeth was the first business-services partner in the GCC region; it functions as the back-end organization for the group and serves to promote Lean functions and practices. Tanfeeth was formed in 2011 and has experienced rapid growth ever since, with total headcount doubling in size from 1,500 to 3,000 employees in the last four years.

A group-level decision that was executed in February 2017 resulted in an organizational change for the group: relocating wholesale banking back-end operations and amalgamating them with Tanfeeth’s operations. This change in organizational structure brought about significant challenges for the learning and development team due to differences in organizational and employee culture between Tanfeeth and the ENBD Group. The Incredible Client Service 2.0 Wholesale Banking Edition (ICE 2.0) initiative was introduced to address the service levels of the wholesale banking departments, provide change management for a shift in mindsets and realign service levels to reflect those of the other departments operating within Tanfeeth.

ICE 2.0 was designed and implemented to drive a cultural shift away from “customer service” and toward “customer experience” with the end goal of increasing customer centricity while minimizing the customer experience gap. In a wider business context, there has been a global shift in recent years towards a focus on customer lifetime value (CLV); the importance of repeat customers, advocacy, retention and loyalty is at an all-time high. This is coupled with the empowerment of customers; customers now have higher expectations, have more channels to voice their opinions and can easily change financial institutions if their expectations are not met.

As discussed, the wholesale banking back-end operations were highlighted as a key department within Tanfeeth that was in need of the initiative. Customer surveys and feedback revealed that customer satisfaction ratings were consistently below expected levels. Customer service was typified by individualistic, non-cohesive, silo-based and reactive behavior. The ICE 2.0 initiative was therefore implemented to change this behavior, improve customer satisfaction levels and move to a more-wholistic view of customer experience.

Figure 1: A Visual Journey of the ICE 2.0 Initiative



Source: Tanfeeth

## Overview

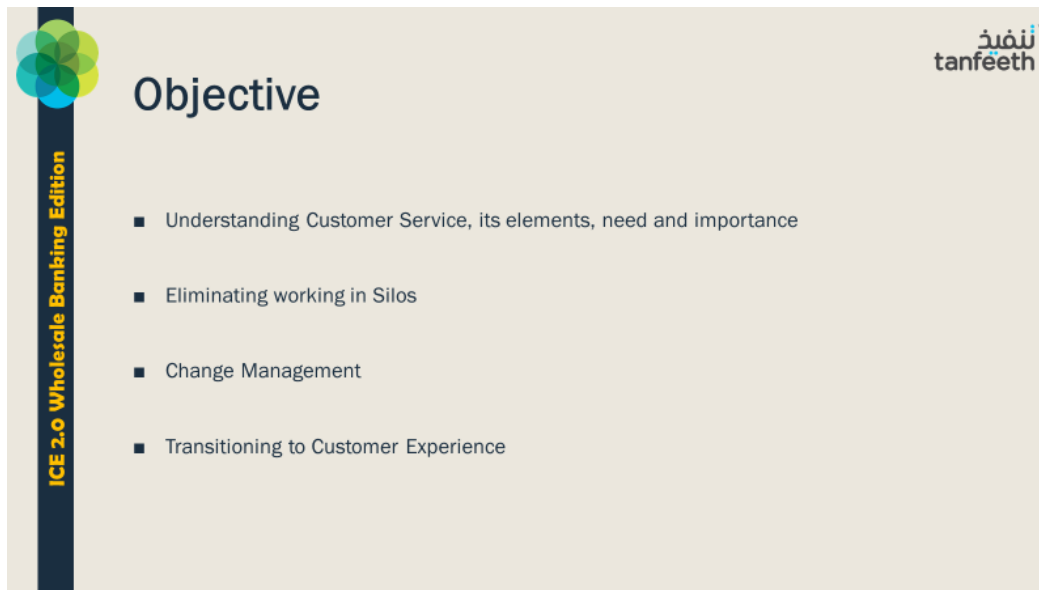
The ICE 2.0 Program was a blended learning program delivered over the duration of eight hours on a weekend by two facilitators (members of the Tanfeeth learning and development team) and was aimed at middle-management grade staff within the wholesale banking department. This department recently had been acquired by Tanfeeth from Emirates NBD's head office; this necessitated a large shift in mindset and working habits for the department.

At the outset, the learning program laid out the company vision and mission statement, as well as corporate strategy for 2017/18. It also defined customer service, highlighted its importance and evaluated current customer service levels within the wholesale banking department. The program then explored the importance of continuous improvement in customer service levels and of aligning customer service to the 2017/18 corporate strategy. Finally, the program focused on managing the change currently being experienced by members of the wholesale banking department, as well as shifting employee mindsets and the departmental culture from customer service toward one of customer experience. This was delivered through a blend of case studies, interactive discussions, question-and answer-sessions and video sessions to ensure employees were exposed to various learning methodologies and provide a holistic learning experience.

The goals for the program were established through a variety of different methods. First, “one-on-one” discussions were held with managers across the wholesale banking department to discuss critical customer service gaps and what steps should be taken to close these gaps. Employees also were asked to contribute via questionnaires and surveys. Additionally, mystery shops were conducted to observe and analyze customer service processes and levels of front-facing customer service teams within the wholesale banking department. Armed with the findings from these activities, the chief operating officer of Tanfeeth and the head of wholesale banking outlined a necessary shift in culture from a fragmented customer service culture to one of integrated and cohesive customer experience. The learning and development department then created the program with four key objectives:

1. Understanding the various elements of customer service and understanding its need and importance to the perception of Tanfeeth, as well as the continued success of the Emirates NBD Group.
2. Eliminating silos within the wholesale banking department and shifting from a fractured individualistic working environment to one of cohesiveness, teamwork and inclusion — all to the betterment of customer service levels.
3. Change management: Understanding the drastic difference in corporate culture and working environment between Emirates NBD Group’s head office and Tanfeeth. It was crucial to the success of the integration of the wholesale banking department into Tanfeeth that expectations were set to ensure a smooth transition and to ensure that the required standard of service delivery were upheld.
4. Transitioning from a customer service mindset to a customer experience mindset. It was important to move away from transactional customer service and recognize the importance of customer care across the lifetime of a customer, ensuring that customer advocacy, retention and loyalty were driven by a new customer-centric approach — increasing proximity to the customer at all stages of the customer journey to improve satisfaction levels.

Figure 2: Objectives of the ICE 2.0 Initiative



Source: Tanfeeth

As previously discussed, the ICE 2.0 Program was not integrated throughout the enterprise; the purpose of the program to target the change management of the integration of the wholesale banking department into Tanfeeth from Emirates NBD's head office, shifting customer service culture to customer experience. This was driven by observing levels of customer service across front-facing wholesale banking teams.

However, the ICE 2.0 program was linked to the enterprise-wide client service development program, which sought to standardize customer interactions with staff across Tanfeeth. The goal of this program was to ensure a consistent quality of communication and service to meet customer expectations, regardless of which department the customer was interacting with.

One of many strengths of the program was the close link between program content and organizational objectives. This helped to gain buy-in from senior management, as well as ensuring that staff recognized the importance of the program and implemented it once back in their roles in the organization.

Figure 3: Tanfeeth Mission Statement



Source: Tanfeeth

The mission statement of a company is important for many reasons, including determining the future direction of the company, developing a philosophy for employees to follow and shaping both present and future company strategies. Clearly, there is a cohesive message being delivered by the initiative. To ensure a "remarkable customer experience" is achieved, the culture needs to shift toward customer experience and the integration of the wholesale banking department needs to be seamless and efficient.

Furthermore, the program also was aligned very closely with the 2016/17 business strategy.

Figure 4: The Five Gears of Tanfeeth’s Company Strategy



Source: Tanfeeth

Figure 5: How the Initiative is Linked to Tanfeeth’s Strategic Goals — Gear 2



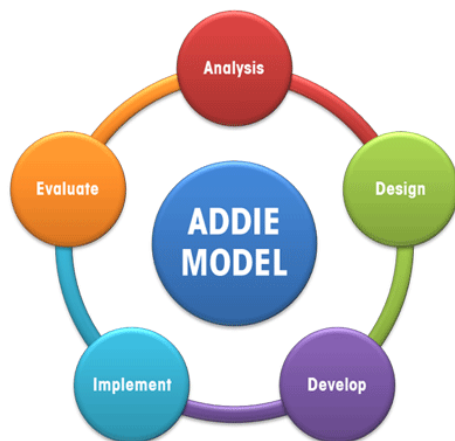
Source: Tanfeeth

It is clear that the initiative tied-in closely with both the vision and mission statements of the company, as well as the company's strategic objectives. This was crucial in gaining top-down buy-in for the initiative, but also important it allowed the learning and development team to drive change in the organization, reflecting the 'learning culture' of Tanfeeth.

## Design of the Program

Due to the importance of aligning ICE 2.0 with Tanfeeth's organizational goals of 2016/17, the learning and development team followed the ADDIE Instructional design model.

**Figure 6: ADDIE Instructional Design Model**



Source: Tanfeeth

Having conducted the needs analysis for the program at an organizational, task and individual level (see the previous section), the learning and development team moved on to the design of the ICE program itself.

However, it is first imperative to clearly define the intended audience for the ICE 2.0.

### Initiative

The initiative was specifically designed for three staff grades: "M" (assistant manager), "P" (Manager) and "Q" (associate vice president). There were two main reasons for this. First, these members of the wholesale banking department were identified by the Tanfeeth learning and development team as being key facilitators of the future shift in organizational mindset from a customer services to a customer experience culture. This was based on a "top down" implementation strategy, relying on these staff members to



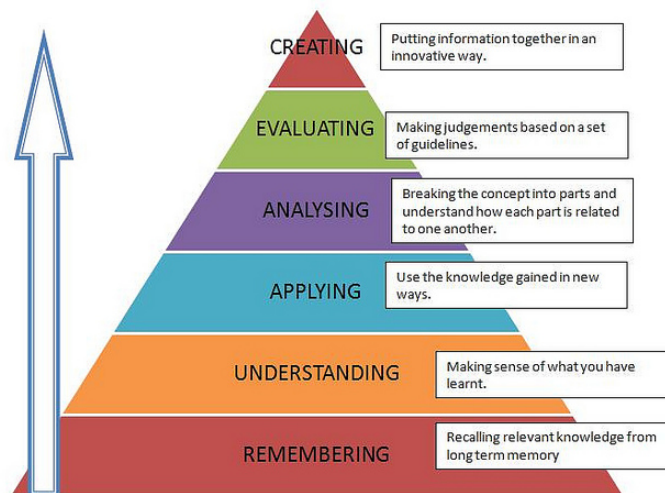
drive and champion change within the department for this change to trickle down to the more-junior levels of staff. Secondly, another primary goal of the program was to ensure a change in cultural mindset and to facilitate collaboration, openness and acceptance while eliminating the traditional and outdated “silo” model.

A batch of 25 M, P and Q grades was selected as the optimum size for the learning initiative. This was deemed large enough to facilitate a useful level of intellectual exchange among the group, yet small enough that case studies and simulations were still effective. Special attention was given to the facilitators who would be delivering the program. The design of the program dictated two facilitators: one junior grade facilitator with strong ties to the wholesale banking department and one M-grade facilitator. The program was designed in this way to optimize employee engagement and buy-in; they experienced delivery both from a familiar facilitator with in-depth knowledge of the department while also engaging a facilitator with the gravitas to ensure the delivery was well-received.

Having identified the target audience, it was now crucial to design the program in a way that ensured staff buy-in and acceptance, as well as ensuring that lessons during the delivery of the program would be implemented in the wholesale banking department. To do this, the learning and development team focused on effective instructional design, beginning with a short statement of the goal of the program and creating corresponding objectives that specified what the participants would do and learn.

The objective of the training was not just the acquisition of knowledge, but also the teaching of skills to implement this knowledge in the workplace (i.e., the day-to-day operations of the wholesale banking department). One of the key focuses of the ICE 2.0 Program was to facilitate change management of the transition of the wholesale banking department from Emirates NBD Group to Tanfeeth. Therefore, the implementation of ideas learned in the program was vital. It is evident in the below slide that the objectives for the program proceeded in a hierarchical manner based on Bloom’s Taxonomy so as to ensure maximum retention, but also the ability to implement what is retained.

Figure 7: Bloom's Taxonomy Model



Source: Tanfeeth

A blended learning approach was adopted when designing this training with a focus on case studies, interactive question-and-answer sessions and classroom learning. Blended learning was selected to ensure that the delivery and learning methodologies applied to the broadest spectrum of learning appetites possible while retaining high engagement. Therefore, the program was designed to appeal to visual, auditory and kinesthetic learners. Case studies of best practice and worst practice examples of customer experience were introduced to ensure everyone was clear on the levels expected. Due to the large cultural diversity in department, it was essential each and every member fully understood what was meant by good customer experience; these case studies served as examples to drive the point home. Additionally, there is much evidence to indicate that active learning and participation such as case studies, role-plays and Q&A sessions improves the likelihood of retention and implementation in the work place.

An important aspect in the design of the program was scheduling — when and for how long would the program run. It was decided the program would be scheduled on a weekend and would be designed to run from 8 a.m. until 5 p.m., with a company-provided breakfast and lunch break. This ensured that the participants' schedule was minimally interrupted during a stressful and busy transition period while also increasing participant buy-in to the program — they were giving up their personal time on a weekend to attend the program.

Linked to this is that the program was purposefully designed to be voluntary. Again, this was put in place to ensure participant buy-in — only those who truly wanted to be in attendance would be there. This helped to ensure retention of knowledge and helped with the implementation of ideas learned in the program in the post-program workplace. At the culmination of the program, participants signed a “commitment form” agreeing to embrace the opportunity of a “strategic project” to put what they had learned into effect. Once designed, they would have to implement their project among their working team, ensuring knowledge transfer to the employees they managed through the methodology of on-the-job training and helping to assist the change management efforts in the wholesale banking department.

## **Delivery of the Program**

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As previously discussed, the delivery of the program focused on a blended learning methodology. Primarily, the ICE 2.0 Program was based around instructor-led learning, which was then coupled with certain aspects of on-the-job learning.

Instructor-led learning was selected for various reasons. Studies have shown that instructor-led learning supports a wide variety of learning activities; this was reflected in the program with the use of presentations, lectures, case studies, group discussions and simulations. This also enabled the program to appeal to the widest spectrum of learning preferences as it possibly could.

Furthermore, instructor-led training facilitated the sharing of ideas and allowed for real-time feedback. This was vital in ensuring ideas were adopted and retained correctly to ensure best practices were being taken back into the workplace.

On-the-job training was selected as it enabled program participants to experience and work toward the program’s teachings and objectives in a familiar environment. It also facilitated to sharing of knowledge with their team. As previously mentioned, this was carried out by requesting them to design and implement a strategic project (this will be discussed further in the “Change Management” section of the document).

This blend of instructor-led and on-the-job learning methodologies helped the learning and development team overcome difficulties such as the delivery of a standardized training program in what is a very multicultural context.

As previously discussed in the “Design” section of this document, special attention was given to the selection of instructors for the ICE 2.0 program. Instructor selection was seen



as a crucial part of both the design and delivery of the program. Factors taken into consideration included:

1. Training expertise.
2. Subject matter expertise.
3. Credibility with the local audience (the wholesale banking department).
4. Cultural familiarity.
5. Communication and language expertise.

It proved difficult to find all the above required skills in one facilitator, which is why the learning and development team decided that pairing facilitators would be an effective form of delivery. Not only did the two facilitators satisfy the required experience criteria (above), but this also ensured that a larger group could be included in the program without compromising on the quality of delivery, as well as reducing stress on the lead facilitator.

The issue of cultural influence on the delivery of the ICE 2.0 program was another issue carefully considered by the learning and development team and was closely linked with the aforementioned facilitator selection. It was important to consider the following factors:

1. How the culture of the program group would view the education and training program.
2. What group members would expect from their lead facilitator (in many cultures the facilitator is perceived as and expected to act as an expert).
3. How group members perceived the role of a learner and the learning process in general.

The selection of the facilitators, the blended learning methodology in what is a relatively low “power-distance” culture at Tanfeeth and the education of the group as to the importance of learning and the objectives of this program all helped to ensure the delivery of the program was a success.

Finally, logistical considerations had an effect on the delivery of the ICE 2.0 program. As previously mentioned, one such consideration was the scheduling of the program resulting in the program being held on a weekend. Additionally, the location of the program also was considered. It was decided that a conference room within the Tanfeeth offices would be most-effective as it ensured the group was comfortable in these familiar surroundings, travel to and from the program was familiar and stress-free and it incurred no additional overhead.

## **Change Management Efforts**

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The primary challenge faced by the learning and development team was one of scheduling. Simply put, the transition period of the wholesale banking department was an extremely busy time for all concerned and trying to find a time slot acceptable for each of the 25 members of the batch proved extremely difficult — particularly during the working week.

This challenge was overcome by taking the decision to schedule the program on a weekend. Being a voluntary program, employee buy-in was particularly important and scheduling the program on a weekend helped increase buy-in in two ways. First, it ensured that employees did not feel that their work time was being encroached upon and they were still able to carry out their duties to the best of their abilities during the work week. Second, by giving up their free-time on a weekend, it signaled to the facilitators that they were serious about contributing to the program, thereby empowering the facilitators to deliver the program material.

Another challenge was identified when implementing the strategy projects that formed part of the post-program performance measures. It was imperative that these projects were implemented with the least amount of operating challenges and the least disruption to the schedule and operational efficiency of the wholesale banking team.

This challenge was overcome by providing support to the program participants to effectively design and implement these projects within their teams and management support was particularly important to manage workloads effectively.

One final challenge of delivering the program centered around change management. As discussed previously, a large shift in cultural behavior and business mindsets was required to make the transition of the wholesale banking department from Emirates NBD's head office to Tanfeeth a successful one. The wholesale banking department was typified by individualistic, silo-based work. A shift toward open, cohesive and inclusive working

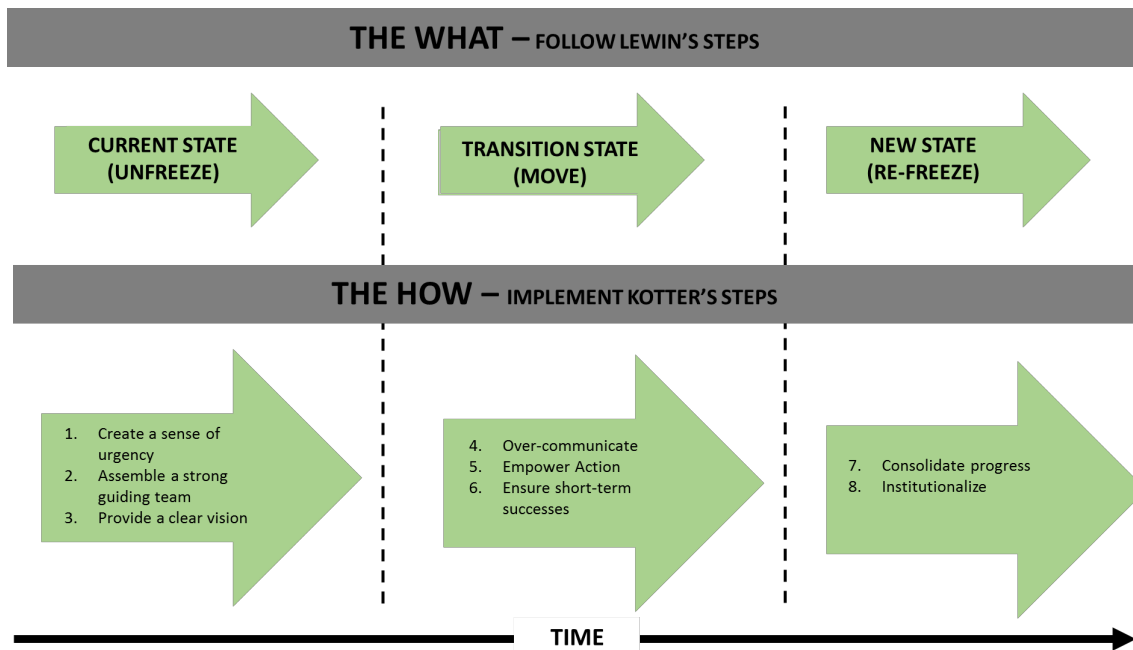
habits was required. The shift was made particularly difficult due to the fact that a large proportion of the department had already spent several years in their roles based at Emirates NBD Group's head office and these practices were deeply embedded.

Change management within Tanfeeth was — and always is — addressed in a very methodical fashion. Initially, the learning and development team, in conjunction with the senior management team, attempted to create conditions which would facilitate change, such as:

- **A Shared Purpose** — If employees buy-in to the overall necessity for the change, they are more likely to make a legitimate effort to change. This was achieved by clearly stating the goals of the ICE 2.0 initiative and why the initiative was necessary, illustrated by data of underperforming teams. It also was achieved by closely aligning the initiative with Tanfeeth's strategic gears (objectives).
- **Reinforcement Systems** — Measures such as management processes, specific data measurement, clear communication and encouragement were embedded in the ICE 2.0 initiative, along with other critical support factors. This served to maintain employee motivation and reinforced the necessity for the change, which was facilitated by the learnings delivered by the initiative.
- **Provide the Skills Required for the Change** — This step was clearly executed by the trainings delivered in the initiative.
- **Consistent Role Models** — Role models were members of the senior management team who had experienced successful upward progression in their careers with Tanfeeth. This provided participants with motivation, as well as illustrated best practices that the learning and development team hoped to enforce.

Tanfeeth's learning and development team followed a clear change management model to provide a framework around which to manage change before, during and after the ICE 2.0 initiative was delivered. This model is an integration of the Kurt Lewin and John Kotter change models, with the former providing a theoretical framework and the latter illustrating practical aspects involved with managing change. This framework is illustrated below.

**Figure 8: Change Management Model**



Source: Tanfeeth

The current state is concerned with introducing activities that prepare participants for change. In the case of the ICE 2.0 initiative, this involved outlining clear reasons for the training and desired outcomes from the training. The transition state involves activities designed to facilitate the change, namely, the learning activities from the initiative itself. The new state centers around activities designed to enhance the adoption of the changes in the workplace. In the case of the ICE 2.0 initiative, this involved the implementation of post-initiative projects.

## Measurable Benefits

The Tanfeeth learning and development team used Donald L. Kirkpatrick's "Four Levels" model to evaluate the ICE Program and subsequently analyze the measurable benefits that resulted from the program.

Figure 9: Kirkpatrick’s ‘Four Level’ Model

## Kirkpatrick’s (1994) four level model

Level	What is measured	Examples
1 Reaction - changes in perception , satisfaction levels	How students feel about the learning experience	Feedback forms
2 Learning – changes in knowledge, skills, attitudes	Increase in student knowledge and skills	Informal/informal assessment before and after learning interventions
3 Changes in behavior/ practices	How far learning is applied in practice resulting in personal changes	Observations and interviews of students over time
4 Results - noticeable changes in results or conditions.	How far the module/course impacts on program or institutional factors ( student performance, retention, throughput).	Use institutional data to identify whether the program/module shifts the nature of student participation/ performance/engagement. Student surveys.

Source: Tanfeeth

It was clear to see that the ICE program had several measurable benefits. Among them were:

- Following the delivery of ICE 2.0, the initiative received positive feedback from employees within the wholesale banking department. This is evident in feedback forms and surveys taken immediately after the training (Level 1 in Kirkpatrick’s model). The benefit of this is that a positive learning experience is more likely to lead to successful retention and use of the knowledge delivered. An additional benefit is that the successful nature of the initiative enhanced the already-strong credibility of the learning and development department in the eyes of senior management, enabling them to affect greater change in the future.

As is shown by the below feedback form, several employees praised the blended learning methodology of including interactive activities, case studies and discussions.





**Figure 10: Feedback Form Distributed to ICE 2.0 Class Following Program Delivery**

TEXT ONLY QUESTION	RESPONSES
<p>What worked well?</p>	<ul style="list-style-type: none"> <li>• The case studies</li> <li>• It was interactive</li> <li>• THE CASE STUDIES</li> <li>• working as group, get more knowledge</li> <li>• The comparison of top 16 companies which proved that better customer service need not mean better customer experience.</li> <li>• Good to know that where we stand as a bank in UAE rating.</li> <li>• The case study</li> <li>• We all worked as a team and different teams shared their experiences and discussed where we can improve and how we can coordinate with various teams in order to achieve better customer experience</li> <li>• the overall change in focus of the organization moving towards enhancing the "customer experience" with the bank, has been received well with the participants all across.</li> <li>• The entire training worked well.</li> <li>• trainer was good.</li> <li>• Group activities</li> <li>• overall it was ok</li> <li>• Activities were good</li> <li>• Clear concepts and case studies relevant to the training made it effective and easy to grasp</li> <li>• Met ppl from other WB teams and it was quite interactive.</li> <li>• Case studies and the Brain Storming exercises</li> <li>• engagement level was good.</li> <li>• every arrangements are well</li> <li>• THE PURPOSE OF THE TRAINING WAS SERVED</li> <li>• Motivation to express concerned and views.</li> <li>• case study</li> <li>• We were able to learn the new culture (customer experience)</li> <li>• case studies and discussions such as "what was the missteps followed" and "what could have been done differently"</li> <li>• TEAM WORK</li> <li>• The course attended was very nice with a very good ambient and it has taught us a lot of perspective things which will be very useful in attending customers and keeping up the image of our organization.</li> <li>• Team activities and using example to explain various points.</li> <li>• case study</li> <li>• Time management.</li> <li>• This was an interactive session focusing on customer service/experience covering the gears. The course was very interesting.</li> <li>• audio visual examples</li> <li>• New ideas and topics with new learnings</li> <li>• case study</li> </ul>

Source: Tanfeeth

The table below also is an indicator as to the success the delivery team had with the initiative. A Likert item is a statement that the respondent is asked to evaluate by giving it a quantitative value. In this case, 1 = strongly disagree; 3 = neither agree nor disagree; and 5 = strongly agree.

**Figure 11: LIKERT Table Summarizing Employee Feedback**

<i>Question Number</i>	<i>Likert Question</i>	<i>Average Rating</i>
1	<i>The instructor was knowledgeable about course content.</i>	4.18
2	<i>Value for time spent.</i>	3.76
3	<i>Quality of material.</i>	3.94
4	<i>Was the faculty effective?</i>	4.15

Source: Tanfeeth

The ICE 2.0 Initiative was largely responsible for a measured and sustained improvement in customer feedback resulting from a shift toward a customer experience culture and customer-centricity. This is direct evidence that customer service levels increased as a result of the ICE initiative (Level 4 of Kirkpatrick’s model). This can be seen in the customer satisfaction scores and net promoter scores from 2016-17, as illustrated in the below table.

**Figure 12: Customer Satisfaction and Net Promoter Scores 2016-17**

<i>Measurable</i>	<i>2016</i>	<i>2017</i>	<i>% Change</i>
<i>Customer Satisfaction (CSAT)</i>	8.3	8.5	2.4%
<i>Net Promoter Score (NPS)</i>	31	35	+12.9%

Source: Tanfeeth

Another measurable that indicates the increase in customer satisfaction resulting from the ICE 2.0 initiative is customer complaints. Customer calls decreased from 700 in 2016 (pre-CE delivery) to 400 (post-ICE delivery) and customer emails decreased from 1,200 in 2016 to 750 in 2017.

## Overall

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Following the delivery of the ICE 2.0 initiative, participants were requested to complete and return a feedback form with any changes that they would like to see in the delivery of the initiative. A summary of the feedback is as follows:

- Although 25 participants is not an extremely large batch size, several participants thought that a smaller batch size could produce optimal trainee-trainer interaction and optimize results.
- Participants requested a soft copy of the material being delivered to enable them to make notes at their own pace.
- Despite extensive praise for the interactivity of the program, a small number of participants felt it could have gone further with an increased number of role-play situations to bring the learning material to life.

The blended learning approach of the initiative was observed to be highly effective in ensuring employee engagement and motivations during the initiative and in facilitating knowledge retention.

Furthermore, a key design feature that enabled the program to be a success was the paired-facilitator system; this awareness of cultural differences and sensitivities between the wholesale banking department and other departments within Tanfeeth generated high levels of buy-in from the staff.

Clear evidence of the success of the program can be found not just in the data supplied in this document, but also in the recognition from the Emirates NBD Group. The ICE 2.0 Initiative was widely praised throughout the group, winning several GEM awards (prestigious internal awards for excellence); specifically, the initiative also won the Emerald GEM Award for the most-outstanding initiative across the group.

While the ICE 2.0 initiative was not designed to be a rolling series of training initiative, but rather a trainer-led intervention to facilitate a behavioral mindset change and align the wholesale banking department with Tanfeeth's performance standards and values. Aftercare for the initiative continues to this day.

Strategic projects implemented in the wholesale banking department as a result of the program are carefully monitored by both subject matter experts within the learning and



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development team and by Tanfeeth senior management to track progress and optimize results. This generates a feedback loop long after the program has concluded to constantly empower managers and employees within the wholesale banking department to achieve excellence.



## About Brandon Hall Group

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