



Financial services

Financial organisations face a unique set of constraints and challenges, such as regulatory requirements and coping with organisational change. Communicating effectively with customers and internal staff is a crucial element for any service-based organisation, where the quality of customer services is essential to customer satisfaction and retention.

CTC has been assisting organisations in the financial sector for several years and understands the regulatory and compliance environment in which global financial organisations operate.

Background

A large, global financial organisation had recently sold their online payment processing business unit to a consortium of venture capitalists. The divestment required a major business change programme.

Requirements

CTC assisted with the roll-out of a communications programme to customers, explaining the change in company ownership and the implications of the change. CTC also managed the rebranding and updating of documentation in the divested business.

Challenges

The new company brand had not been decided, so an interim brand had to be implemented. Managing the communications and rebranding programme required close coordination with other teams and areas within the organisation, as well as external parties, suppliers and partners.

Solutions

The project included the following components:

- Updating all customer and partner facing documentation with the new company branding—removing references to old company address details, logos and VAT information.
- Updating all technical documentation and support literature with the new brand details and with new technical implementation information.
- Rolling out a communications programme to customers and partners— this included printed letters, emails and links to website support pages for more information.

Carefully project planning was essential to ensure a successful roll out.



Unique features

- **Careful coordination** – with programme managers, partners, stakeholders and legal teams to ensure compliance and appropriateness of content
- **Partner and customer segmentation of communications** – to ensure appropriate targeting of messages
- **Ready, Steady, Go approach to communications**– to ensure that customers were informed early of the changes and provided with further details as required.
- **Multi-channel communication** – combining email, text, printed letter, video and website communications.
- **Social media updates** – on Face book, Twitter and Wikipedia,
- **Implementation of new branding** – on websites, documentation and templates
- **Updates to printed signage** – including banners and posters.

Project Feedback

The migration programme was rolled out without any issues and all those involved received thanks and positive feedback from the management board.

CTC was invited to provide support for follow-on projects.

Clients in this sector

Customers in this sector who have used our services include: Royal Bank of Scotland, First Data, WorldPay and Moneybookers (Skrill).

View Samples

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