CASE STUDY: Worldwide Account Transition Program

Solution: Account Transition Program
Services Provided: Program Development

Bloom Consulting Group is a fast-growing business management consulting firm that delivers strategic services to security, marketing, and sales executives.

Engagement Overview

The worldwide account transition program helps mitigate Customer and Partner Experience (CPE) risk as a result of segmentation shift and account manager churn. Bloom managed the process and drove the program for the fourth consecutive year. The client wanted to incorporate feedback received from the previous year, obtain stakeholder buy-in, and implement the program for customers and partners.

Challenges

Inconsistent quality of account transitions in unmanaged segments for customers and partners. These segments were at high-risk for dissatisfaction.

Gaps in execution and low adoption of the WW quality check pilot (verifies that transitions are executed with high-quality touch).

Bloom Solution

The Bloom team executed a corporate sponsored email campaign in select areas for accounts landing in the unmanaged segments. As a result there was higher net satisfaction (NSAT) at mid-year with transitioned accounts compared to accounts that did not transition.

The team enhanced the quality assessment process by having area and subsidiary leadership review the quality of execution of satisfaction conditions, account transitions, and survey response opportunity which helped drive positive results January to June NSAT.

The Account Transition process became integrated into the relationship management process, which helped address overall health of the account Customer Partner Experience. With the new quality assessment process in place, high quality account transitions will help ensure positive transition experiences, driving positive results January to June NSAT.

Services

Program Development Support

- Designed the program by identifying account transitions, notifying transferring and receiving Account Managers, and monitoring account hand-offs.
- Designed and implemented program resources to facilitate execution of transition within corporate and field. Resources included implementation guides, role readiness and scripts, reporting, video trainings, weekly status reporting, monthly field calls, and communication.

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