



## Building High Value Relationships™ (BHVR) Sample of Program Results

1. New England Financial / Information Services (currently, MetLife) – Boston, MA
2. American Management Systems – AMS U Emerging Leaders Program - Fairfax, VA
3. STS Systems – Technical Customer Service Group, and Professional Services Group - Montreal, Canada
4. Fidelity Investments Systems Company – Dallas, TX
5. Oakley, Inc – Customer Service and Brand Management Group – Orange County, CA

- **New England Financial / Information Services** (currently MetLife)

**Situation:** In a major organizational re-structuring, the IT group lost its ‘captive’ customers, and needed to develop a customer-focused culture within 1 year. At the time, 48% of its customers stated their prices for services were extremely high.

**Result:** During the twelve months after the beginning of the BHVR culture change initiative, the IT was able to raise its prices by 50% while reducing complaints about pricing to 12% of its customers.

- **American Management Systems – AMS U Emerging Leaders Program**

**Situation:** Recognizing the need for stronger client relationship management skills among its senior managers, AMS U sought a program to address and shift the perspective of its emerging leaders (most of whom were successful project managers, business analysts, etc) from managing activities to managing relationships.

**Result:** Over 2-1/2 years, AMS sent over 1200 people through the BHVR program, producing a cultural shift in how clients are thought about and handled. Specific solutions related to applying BHVR skills included: recovering damaged relationships (some more than 2 years old), uncovering new opportunities with clients, being brought into client planning sessions earlier, improved relations with AMS associates and team members, as well as clients.

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- **STS Systems** – Technical Client Services Group

**Situation:** The level of satisfaction with long-established as well as newer clients was dropping significantly, including major clients defecting to competitors. As the client services group provided a major source of continuing contract revenues at a high profit margin, rapid improvement was demanded by company management.

**Result:** Overall client satisfaction started a significant improvement within 60 days of the initial program. In addition, six of their largest and most difficult clients were specifically targeted, and all of these clients noted substantial positive change and improved satisfaction in their relationship with STS. Over \$400,000 in potential revenue losses due to client defections were averted in the first 6 months. Cooperation and collaboration with other STS groups also improved dramatically.

- **Fidelity Investments Systems Company**

**Situation:** As the technical backbone and support for all of Fidelity's internal and external operations, the Systems Company was experiencing numerous incidents of miscommunications, mis-understanding, and substantial reworking on delivered projects and systems. This was causing extensive resource shortages, as well as budgetary problems on both the revenue and profitability sides.

**Result:** The day immediately after the 2-day session, the most senior attendee (a division VP) called to report solving his most vexing client issue, which has consumed his time and the time of his two top managers for over 6 months, using skills learned in the BHVR program. Class ratings, on a 1 to 5 point scale, included 79 5's out of the 80 items rated.

- **Oakley, Inc** - Customer Service and Brand Management Group

**Situation:** Looking to protect and project their brand image in all interactions with their retailers and end-users, this group sought to build a highly responsive, value-based, customer-focused culture. In addition to improving their external relationships, they sought to reduce employee turn-over, with its related recruiting and training expenses, and improve teamwork and morale.

**Result:** Over the next year, employee turnover in this group dropped by 50%, while overall client satisfaction (which was already reasonably good) improved 30%. Client focused initiatives started in this group were adopted by other parts of the company.

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