

Norwegian financial services group – SMS event-triggered feedback process

The case was made for one of Norway's largest financial services group and one of the largest in the Nordic region in terms of market capitalisation. The client offers a full range of financial services, including loans, savings, advisory services, insurance and pension products for retail and corporate customers..

THE CHALLENGE

The client needed a flexible Enterprise Feedback System that could cover many of their diverse needs within one system. It needed to be launched quickly and without the need for too much involvement of their internal IT resources. They principally needed a solution that could get more in-depth feedback from their B2B clients and in parallel use new channels for distributing invitations and reports.

THE SOLUTION

With the **fully integrated customer feedback management platform** and dedicated **team of experienced insights consultants**, it was possible build a flexible, integrated and automated solution for the B2B department's evaluation.

The Process:

1. After every client meeting the consultant enters the customer's company ID and the mobile number(s) of the customer people attending the meeting
2. The consultant fills in a form with relevant data from the meeting eg. the type of meeting, outcomes, text comments etc.
3. An automated API call to the national registry of Norway gets the relevant company information (turnover, size, location etc) and the data are then used to personalise the survey and reporting
4. Automatic SMS are sent to participants with a personalised invitation to give feedback
5. Automated data processing workflows match all relevant data from multiple sources into a single source database
6. Automated data processing then calculates KPIs and Indexes
7. A dashboard report with hierarchical access control is then distributed and automatically updated.

TECHNICAL KEY FEATURES

Key features of the solutions are a flexible API gathering external information, automatic and scheduled data processing, automatic SMS delivery, a flexible and hierarchical distribution of reports and a user-friendly questionnaire format.