

BROOKESIDE INSIGHT® CASE STUDIES

Working with Brookeside INSIGHT® has shown a positive impact on our clients' business at two different levels:

1 **Fast impact due to the data highlighting an urgent need for action on an individual client.**

2 **Long-term impact through broad programs over a number of survey cycles.**

1. FAST IMPACT EXAMPLES

Immediate financial impact through saved relationships.

- A Global IT leader was able to save a \$250,000 relationship thanks to Brookeside INSIGHT Relationship Assessment results.
- During the rollout of surveys through their network of VARs (value added resellers), a long-standing customer was identified as only a transactional relationship.
- Furthermore, their verbatim comments made clear the need to take action:
"They had been my one and only go-to consulting stop for the past 7 years but based on the current lack of communication and resource availability issues I have been forced to engage other firms".
- Rapid action was taken to improve the relationship resulting in the customer's business being retained.

- Financial services company was able to save a \$6m relationship thanks to Brookeside INSIGHT.
- In a meeting with the account manager the customer said they were "satisfied" and "fine". The INSIGHT™ Relationship Assessment indicated otherwise, marking the relationship as a poor transactional – a very low level of loyalty.
- An urgent high level meeting was arranged and it was discovered that the client had no loyalty and was preparing a request for proposal from other suppliers.
- Following suggested interventions, the account team not only retained the client, but over the following years improved the relationship to "Trusted Advisor" status on the most recent survey.

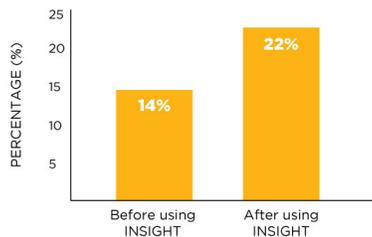


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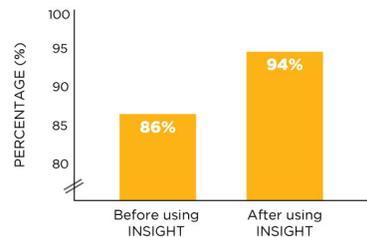
2. LONG-TERM IMPACT EXAMPLES

- A world-leading insurance company using INSIGHT™ saw the proportion of customers seeing their relationship as Trusted Advisor rise from 14% to 22%.
- During the same period they also experienced a rise in their customer retention rate from 86% to 94% as they shifted from customer satisfaction metrics towards using INSIGHT™ as a regular means of measuring and improving customer loyalty.
- With a turnover of several \$Bn p.a., this improvement in retention meant that every year several hundred million dollars worth of income that used to be lost and that had to be replaced by winning new business, stayed with the company as a result of improved customer relationships.
- An additional factor in the improvement was that the surveys showed a generic weakness in the client facing teams. They were seen by the clients as expert but arrogant, and so lacking in a willingness to engage with their clients to learn more about their individual needs. Training programs were put in place to address this and they contributed to the overall improvement.

TRUSTED ADVISORS



RETENTION



- A world leading business services company engaged Brookeside to help them address a retention problem. With over 10% of the client base being lost each year it was recognised that each % improvement would be worth around £15m.
- Over the course of two years of surveys, with additional guidance from Brookeside to the company's retention team, the retention rate has risen to around 93% - worth an additional £60m. In addition, the margin on retained contracts is running 30% above budget so those relationships are not having to be bought back at discounted rates.
- Finally trend analysis of individual who have taken the survey more than once has shown a very positive trend with 70% either improving their level of loyalty or remaining at the previously high level - in other words 2 out of 3 is a good news story.

