



Case Study

Improving the Customer Experience



Who's the client?

Royal Bank of Scotland Invoice Finance (RBSIF) is the UK market leader in the invoice finance based lending marketplace. The organisation is staffed by over 1200 employees serving the needs of several thousand clients and generating over £250m in annual income.

What did the client need?

In order to maintain and extend their market leading position, RBSIF have made a renewed commitment to place service at the heart of everything they do. This pledge extends far beyond the usual focus on good external customer service (important though that is) and instead broadens attention to every person, in every role in the business irrespective of their proximity to external clients.

How did it work?

Working initially with a cross-functional representative team, Positive Momentum Ltd co-created a set of three highly practical core service principles and nine common sense service behaviours - three per service principle. These principles and behaviours had to have relevance and credibility across every area of the organisation and had to appeal to every level of employee. Next, a 45-minute workshop was developed for each service behaviour that could be credibly delivered by managers within the business, and then finally all managers attended a 2-day workshop to prepare them for delivering the workshops to their teams over a 9-12 month period.

What did Positive Momentum do?

- 1 Worked with the business to create a genuinely bespoke set of service principles and behaviours.
- 2 Developed a suite of credible and easy to run workshops supported by a set of impactful workshop delivery collateral for managers.
- 3 Delivered a 2-day facilitation skills workshop for all leaders to introduce the programme and prepare them thoroughly for outstanding delivery to their teams.

What were the results?

The client reports that "This programme has been received excellently by our leaders and we can see evidence that they are applying the ideas into the day-to-day workings of their businesses in a way that is relevant to their specific team. As the sessions roll into the business it has created more awareness of the way in which each member of each team impacts daily on their customer. As a result things are changing immediately".

What does the client say about Positive Momentum?

🔥 This practical programme has created genuine energy and commitment and has empowered our leaders to challenge and extend our service standards like never before. 🔥

Ian Wright
Director, Operations
RBS Invoice Finance

