

Turning a Broken Client Portfolio Into a Working System

CREATIVE BENEFIT SOLUTION LTD

Implementation Consultant | Jul 2016 – Apr 2017 | Croydon, UK



56+

ACTIVE CLIENTS

Employee-benefits clients across technology implementation, pension compliance, service delivery and ongoing client relationships.



THE CHALLENGE

I inherited a portfolio of 56+ active clients with unresolved service issues, dissatisfied customers and limited visibility over what was outstanding. Information was fragmented, processes were unclear and manual administration created ongoing delays and errors.

HOW I APPROACHED IT



BEFORE

A fragmented and reactive portfolio

- ✗ 56+ active clients with unresolved service issues
- ✗ Dissatisfied clients and low confidence
- ✗ Poor visibility of outstanding work
- ✗ Information spread across different places
- ✗ Unclear progress and priorities
- ✗ Manual administration and inefficient processes



AFTER

A structured portfolio and renewed client confidence

- ✓ Clear visibility across all clients and next actions
- ✓ Improved client satisfaction
- ✓ Rebuilt client confidence and trust
- ✓ Reduced manual administration
- ✓ More consistent processes and communication
- ✓ Stronger, long-term client relationships



KEY INSIGHT

The problem wasn't simply dissatisfied clients and unclear operational and team ownership. The underlying problem was a **lack of visibility and operating structure around what needed to happen.**



KEY DELIVERABLES

Portfolio analysis and issue resolution

Implementation guide (pension-scheme progress)

Improved processes and reduced manual work

Client training and ongoing support



SKILLS USED

Project Management

Business Operations

Process Improvement

Customer Experience

Business Process Modeling