

Barclays

Mystery shopping takes knowledge of customer journey to the next level

CLIENT ISSUE

As one of the UK's leading banks, Barclays is continuously engaged in **attracting, retaining and developing customers**. The bank's competitive edge comes from the way its people personally identify and satisfy the needs of potential and existing customers. Barclays had been telephoning customers to understand levels of satisfaction, but was conscious that this provided a limited picture of the **customer experience**.

GRASS ROOTS SOLUTION

We have developed a mystery shopping programme that measures the **customer journey** of a Barclays account holder. This involves Grass Roots mystery shoppers opening a Barclays account and conducting 'real' transactions. Shoppers are selected to match the customer profile, making them credible.

A comprehensive feasibility study was conducted to ensure the suitability of the methodology and systems prior to national launch in 2007.

Fieldwork reflects branch characteristics, as larger branches are visited more frequently. Competitor branches are also included for benchmarking purposes. Each branch receives a report on the entire visit and includes first impressions; queue time and handling; enquiry handling; establishing customer needs; product knowledge and recommendations; closing the enquiry and overall experience.

The programme is designed to focus on the behaviours of branch staff to identify how they interact with customers whilst delivering the necessary process. Both **behaviours and process** are comprehensively **reported** and we present clear findings supported by detailed verbatim comments.

Branches receive **regular performance** updates presented in graphical form for ease of understanding.

These are linked to a suite of **communication and training** also provided by Grass Roots.

RESULT

The results have been very positive with the programme providing simple to use, **actionable management information**.

Throughout 2008 Barclays has witnessed month-on-month **improvement** in its mystery shopping scores, as staff become increasingly aware of the importance of providing **consistently great service** through positive behaviours. These increases are mirrored by Barclays own data that show levels of customer satisfaction on the rise across the country.

In July 2008 we measured Barclays service against six of its key competitors. Based on basic service elements, overall **satisfaction** and propensity to recommend the brand, Barclays outperformed all of its rivals and claimed the best service in the area in 42% of its branches.

As a result of the success of this programme, Barclays has appointed Grass Roots to conduct mystery shopping for its Telephony, Local Business and new technology propositions.

BARCLAYS

"Grass Roots has provided Barclays with a programme that has taken our knowledge of our customer's journey to the next level. The combined use of communication, education, measurement and feedback has delivered a programme that will help us make Barclays customer service the best on the high street."

Customer Service Manager - Network