



I Work For Daniel

The Power Of Putting Customers
At The Center Of Your Business

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As a professional in the financial services industry, I have always searched for the holy grail of service leadership. My goal was to create the vision to engage the hearts and minds of the people servicing customers every day.

I knew that the only way to create a service experience that I was personally proud of, was to create an environment where people came to work each day feeling like what they were doing was important. I needed to create a sense of pride for each associate, and enable them to serve customers successfully. I have spent years trying different strategies to enable that culture, with varying degrees of success.

As it turns out, I was on the wrong path. It was about more than technology, new products, or efficiencies. The answer lay in the ability of one young man, a customer, to make the difference. It was about establishing a different mindset and creating a culture, built upon a purpose.

At the time, I was working for ING, as Head of Customer Service for the Wealth Management division. During my first year, the group had made significant strides in improving the usual service related metrics. Quality was up, turnaround times for transactions had improved, overall service levels were getting better. It was rewarding as a leader to see the employees stand up straighter, voice their opinions in meetings, and take personal accountability for the results we were producing.

As part of my leadership routine, I would hold occasional town hall meetings with the 700 employees in the division. We would bring the head of Sales in to talk about our growth plans, the Chief Information Officer in to talk about the latest technology. We would have various service teams showcase their improvements. All of this however, was internally focused.

One day I was speaking with one of our brokers. Holly owned her own small brokerage business in the Amish country of Pennsylvania. She was so enthusiastic about her business, and her passion for helping the employees of those businesses was contagious. She glowed as she talked about the importance of the “back office” to her business, and how our support to her, was key to her ability to succeed.

I asked Holly if she would share her story with my staff. I felt like her message was a terrific one, and would reinforce to my team how they impacted lives on a day-to-day basis. I was thinking that this just might be the key to unlocking that personal connection I wanted the team to feel with the customer.

During the next town hall meeting, Holly greeted the group wearing an ING shirt. The first thing she did was pull out a camera to take a picture of the hundreds people in the audience to show her team back home – all three of them – who was behind the service that they ultimately delivered to their customers. Holly then began to share some of her other pictures.

We met her three employees.

We saw the little brick building that held her business.

We saw the horses and buggies on the road in Lancaster, where her business was located.

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We saw the picture of the curly gray haired receptionist at the small business where she helped manage a 401(k) plan. Holly paused to explain that the receptionist was also the payroll clerk, the benefits coordinator and the purchasing agent for the firm.

It was clear that those in the audience were starting to get an appreciation for the personal side of her business, and were gaining an understanding of how real people were depending on them.

Holly proceeded to show a few more pictures of her other customers. The fireman, the storekeeper, the driver who was signing papers to enroll in his 401(k) plan from the bumper of his truck.

What a compelling, but simply real, presentation. The room was getting quieter as she went on.

Then Holly showed us a final picture of a young man. This young man was standing at a machine filling jars. He had a shower cap on his head, and a big grin on his face. You could see how proud he was of his job.

Holly spoke, "This is Daniel. Daniel works in this factory. He lives with his mom, who is single, and fills jars for a living. Daniel is developmentally disabled and will never be able to live on his own. I worked with Daniel's employer and his mother to enroll him in the 401(k) plan that you service. When Daniel's mother dies, the money in his plan will be used to support Daniel in a group home. He doesn't know how to use the internet, he has never called the call center. He probably doesn't even understand that he is in the plan or what its purpose is. His Mother trusts me, and all of you, to do the right thing for Daniel."

Daniel is your customer.

The room was totally silent. Holly concluded her speech and somehow I pulled myself together enough to join her on stage to say thank you and dismiss the group. Walking back to my office, I was unusually somber. I could tell that many employees were experiencing similar emotions.

I was humbled by the responsibility entrusted to me and my staff.

I was grateful to Holly for telling her story.

I was extremely motivated to do the right thing for the Daniels of the world.

When I got back to my office, an email was waiting for me. It was from one of the employees who had been in the audience. This employee's job was to make sure that the statements that got put in the mail every quarter-end, were correct. One could argue that her job was thankless.

No one says "great job" for getting 3 million statements out every quarter, right? And yet there would be hell to pay if even one of them went out wrong. She was layers removed from actually interacting with a customer.

Her email to me read "I have worked in this company for 25 years, and until today, I have never really known what the purpose of my job was. Today, I understand what I do for a living... I work for Daniel."

On that day, I felt like the parts came together. I realized that the key to creating the right service experience wasn't about the business, but rather in the personalization of the customer. While increasing profits, improving quality and launching new products are important - and employees both identify with and take pride in these accomplishments - they didn't hold the key to creating a true passion for service.

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When I later changed jobs, and conducted my first leadership meeting at my new company, I opened with a story. "Let me tell you about why I do the work I do, and what I believe in. I would like to tell you a story about meeting a customer named Daniel."

It has become one thing that has always kept me centered, and the one thing that I try to reinforce with my teams and to those companies with whom I consult.

As I look back to reflect upon my 35 years in this industry, there are times when I feel we are making collective progress, and times that I feel like we have taken two steps backward in the name of efficiency and cost savings. I personally find the compass of Daniel to be just as relevant today as when I first heard Holly's story, a strong reminder of how powerful putting customers at the center of your business can be.

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