



Helping Commercialbank of Qatar to differentiate its customer service in a competitive market

Summary

- Commercialbank of Qatar engaged us to help it become world class at customer relationship management. We designed and implemented a four-phase process to define the required standards and understand the current bench strength of the bank's relationship managers.
- This included a bespoke assessment process, through which we assessed 80 relationship managers. We delivered detailed reports on each one, providing a data-driven view of the bank's bench strength, and up-skilled their line managers, to engage them in the process and ensure ownership of the findings. Our work enabled the bank to target its HR strategies, identify baseline sales metrics to track its return on investment and to deploy its talent more effectively.

Becoming world class at relationship management

In an increasingly competitive and commoditised market, Commercialbank of Qatar has sought ways to truly differentiate its offering. When the bank identified that world-class customer relationship management was central to growing its market share, it engaged us to define the required standards and assess the current bench strength of its relationship managers, before it invested in a development academy. This engagement formed part of a wider sales transformation, with McKinsey and other partners reviewing sales process, pipeline management and capability development.

Our approach

We designed a four-phase process and led the implementation over three months, working in collaboration with Propel International, a Middle Eastern firm of business psychologists, to minimise deployment costs. The four phases were as follows:

1. **We established a benchmark of what good looks like.** We engaged senior management, line managers and employees to identify which competencies made the difference between good and outstanding relationship management. These competencies were grounded in the commercial

landscape, the bank's strategy and the current reality of the business. External and competitor research added to the benchmark's robustness.

2. **We designed a bespoke assessment process to measure what good looks like.** The diagnostic tools included psychometric tests, a structured behavioural interview guide, bespoke role-plays and account plan simulation exercises. Participants used on-line self-assessment to record their perceived strengths and their development areas. We designed suites of exercises for different divisions, tailoring the process to reflect each division's context, product mix and customer profile.
3. **We assessed 80 participants over three weeks.** We ran assessments in partnership with external assessors and trained teams of Commercialbank HR and line managers, ensuring a mix of technical expertise and contextual knowledge. Professional actors made sure the interactive role-plays were consistent and realistic. At the end of each event, we gave every participant feedback on their observed strengths and development needs, including recommendations for maximising their learning. The newly created Relationship Management Academy – a suite of learning and

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development interventions – provided tools and support to enable learning.

4. **We analysed and presented the data.** We developed an action plan based on this data, to actualise the bank's short and medium term commercial benefit. We then integrated these findings with other aspects of the sales transformation, to ensure the activities were joined up.

The deliverables allowed us to identify baseline sales metrics, to track the bank's commercial return on its significant investment. Our work has enabled Commercialbank to deploy talent to the areas of greatest opportunity and line managers have reported that individuals are stepping up their performance, as a result of our insights about increasing their effectiveness. These activities will help Commercialbank to grow its share of the ever-competitive financial services market in the coming years.



The outcome

We delivered:

- 80 detailed diagnostic reports, including strengths and gaps for each relationship manager
- an overall, data-driven view of bench strength across the bank's relationship managers, allowing targeted recruitment, development, retention and succession strategies, and
- Training and up-skilling of line managers, ensuring a high degree of engagement in the process and their ownership of the subsequent findings.

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