

Case Study

How
Pinnacle Financial Strategies

Helped
Bank of Clarke
Revolutionize Their Sales Culture



Bank of Clarke

The logo for Bank of Clarke features the words "Bank of Clarke" in a dark blue, sans-serif font. A large, teal-colored letter "C" is positioned behind the word "Clarke", with its top and bottom curves extending above and below the text.

How it Started

In the fast-paced and competitive world of banking, one of our clients was determined to soar above the rest in service excellence. Bank of Clarke had a vision of cultivating a unique service culture, and this case study delves into how Pinnacle Financial Strategies played a pivotal role in helping them accomplish that resulting in new business while consistently improving their service delivery channels.

Bank of Clarke had been an overdraft client of Pinnacle's for a few years. They reached out to Pinnacle in 2021 to explore the opportunity of a partnership to enhance their service levels.



Soaring Above Service

Bank of Clarke was focused on not just meeting, but exceeding, their customers' expectations.

In February 2022, the bank joined with Pinnacle to launch its training program, aptly named "Soaring Above Service" giving a nod to their mascot at the time, the eagle. Pinnacle facilitated the in-person training sessions, and the staff was engaged with four-hour immersive experiences, setting the stage for a transformative approach to service and sales.

“ *At first, our team was a little skeptical, because this was all new. We'd never done anything like this before,”* said Kathleen Croson, EVP, Head of Community Banking. *“But I think everyone was pleasantly surprised because they really enjoyed the session, she added.* **”**

Continuous Improvement: Mixing It Up in October 2022

Recognizing the need for continual enhancement, Pinnacle returned in October 2022 for another round of training. This time, the sessions mixed all staff members in one session, fostering collaboration and shared learning experiences. The commitment to improvement was evident, laying the foundation for a more proactive and elevated sales and service culture at the bank.

Mystery Shopping Scores: A Measure of Progress

Pinnacle utilized mystery shopping scores as a key metric to gauge improvement, establishing a baseline number to track progress. In 2023, the bank aimed to dial up its service levels, prompting the development of an enhanced program during an in-person visit in March 2023.

Customization and Partnership with Pinnacle

The collaboration between the bank and Pinnacle goes beyond training sessions. Pinnacle is viewed as a true partner, with regular calls and emails ensuring alignment and preparation for each session. The flexibility to adjust the curriculum based on the bank's needs showcases the tailored approach Pinnacle provides.



Adapting to Change: From In-Person to Remote

As the partnership evolved, so did the training delivery method. From in-person to virtual, and now, in 2024, a new approach is being introduced. A Pinnacle trainer will remotely join via video, fostering more interaction among the entire staff gathered in a conference room.



Consistency Amidst Turnover: A Testimony to Training's Efficacy

The bank faced turnover challenges, but the training provided by Pinnacle proved instrumental in maintaining consistency. Transitioning from departmentalized staff to Universal Bankers showcased the adaptability instilled through the program. Pinnacle's online E-Learning courses serve as valuable training resources that enable new employees to expedite their training process and synchronize with the rest of the team.



Role Playing and Mystery Shopping Integration

Initially met with skepticism, role-playing became a cornerstone of the training, aiding staff in recognizing its value. Mystery Shopping data not only drove improvements but also became a focal point for Manager Coaching Workshops, aligning coaching strategies with actual customer experiences.



Consistency Amidst Turnover

Results and Future Aspirations

With focused objectives and the invaluable partnership with Pinnacle, the bank soared to remarkable heights, attaining an extraordinary 89% mystery shopping score in November 2023, a substantial leap from its initial 77% recorded in June of the same year. This exceptional achievement underscores the unwavering commitment to delivering unparalleled service excellence. This commitment is further underscored by the seamless integration of the foundational training principles from the esteemed Soaring Above Service program into their comprehensive onboarding process. Employees who successfully completed this transformative course are poised to embark on the next phase of their professional growth through Pinnacle's cutting-edge "Elevating the Service Experience" curriculum, meticulously designed to elevate both internal and external service standards to a truly exemplary "concierge level."

“ We're instilling the philosophy that selling is synonymous with service throughout the entire organization. Pinnacle has collaborated with our employees to seamlessly integrate this mindset, ensuring that sales activities feel natural and service-oriented

Sarah Butler, AVP, Training Officer.

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As this financial institution continues to grow, Pinnacle stands by as a reliable ally, contributing to the bank's vision of becoming a one-stop-shop known for exceptional service. The ongoing incentives for proactive service, mystery shopping goals, and a commitment to consistent improvement position this bank as a leader in the industry.

This case study illuminates the transformative power of pivoting towards proactive service excellence through innovative training initiatives. Beyond the measurable outcomes, it underscores the profound cultural shift towards elevated service standards. In today's dynamic service landscape, organizations must embrace creativity and adaptability, fostering a culture of continuous learning and development. For banks seeking to enhance their sales and service culture and attract new business, the journey of this financial institution with Pinnacle serves as a compelling testament to the value of investing in staff development and customer-centric innovation.



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