

Chase Client Advocacy

TRANSFORMING CHALLENGES
INTO MEASURABLE IMPACT



INDUSTRY

Financial Services



CLIENT

Chase



SOLUTION AREA

Learning Strategy &
Digital Learning

THE CHALLENGE

The OCCE program was significantly behind schedule, the scope had expanded, and the quality of the work product was not what the sponsor was expecting.

The goal was to reduce problem resolution cycle time—a key metric in the client loyalty equation.

The senior sponsor asked Neil Cerbone to review the project off the record. After a weekend review, it was clear: the plan was unrealistic, the content inconsistent, and the technology plan not feasible.

“Are you willing to stake your career on NCA?”
– Vice Chairman of Chase
(asked of the senior sponsor)

NCA SOLUTION

- **Built quick rapport** and positioned ourselves to maximize the supplier team’s efforts.
- **Leveraged deep experience** in the Chase customer/client experience.
- **Restructured the learning experience** to be practical and realistic.
- **Added humor** to make the 90-minute experience more engaging.
- **Brought in a gaming technology expert** to solve complex technology obstacles.

THE RESULT



Created an online simulation that branches to seven levels and integrates five critical problem resolution skills.



Scores provide a profile of strengths and skill gaps used as coaching tools.



20%

Reduction in Chase’s Problem Cycle Resolution Time.