

Beyond Expectation Service Team B.E.S.T

August 2021



CAPTRUST

B.E.S.T. – Beyond Expectations Service Team

A group of WCS colleagues (including Admin, CMAs, CMCs and Managers) dedicated to providing consistent, proactive, excellent service beyond expectations.

Who we accountable to:

- Clients
- FAs
- One another
- Ourselves

Top 5 Quality Values:

- Security
- Courtesy
- Accuracy
- Efficiency
- Presentation

2021 Committees

- **Service Enhancement**
- **Standardization**
- **Timeline**
- **Welcome**

Service Enhancement Committee

Goal: Identify service enhancement opportunities and develop training/helpful tips to enhance all areas of client service. Maintain a soft-skills/“nugget” section within the monthly WOK newsletters.

- Setting Timing Expectations (May WOK) - *Courtesy*
- The Art of the Follow Up (June WOK) - *Efficiency*
- Digital Roadmap (July WOK) - *Efficiency*
- Phone Etiquette (Coming soon in the August WOK) - *Courtesy*

Standardization Committee

Goal: Identify areas where a standard can be created and implemented to ensure **consistency** in the client experience.

- Standard greeting when answering the phone
- Standard voicemail when away from your desk and out of the office
- Standard out of office email message
- Create instruction guide on how to implement all recommendations

Timeline Committee

Goal: Create a detailed timeline/guide of the typical client onboarding experience. The one-page summary includes expectations on:

- When information gathering conversations will occur
- When/how onboarding paperwork will be created/delivered
- How the funding/investing process works
- When system access will be provided
- The various types of reporting

Provide insight and structure for clients as well as act as a guideline for all CMCs and FAs.

Welcome Committee

Goal: Standardize written communications to clients – *Consistency*

- Standard Introduction/Information Gathering letter
- Standard Onboarding Letter
- Standard Cover Letter for all other items
- Personal/Professional Bio – get to know your CMC

When will these items be available?

- Each committee leader is working with WCSU to rollout these items in the “best” manner 😊
 - Teams Post
 - Small Group Meeting
 - Large Group Meeting
 - Allego – Best Channel and/or assigned Courses
 - Best tile on WCS Intranet
- What’s Next?
 - Exploring new projects

Want to become Active? Want to be part of B.E.S.T?

Contact your manager or Tanya Campo

Thank you for all you do!!