

Haley Consulting Group LLC

HCG HALEY CONSULTING GROUP

Haley Consulting Group LLC is a management consultancy that applies deep expertise in **Integrated Customer Experience** and **Integrated Customer Engagement** to help companies develop and execute world-class customer strategies that improve their customer interactions for material financial improvement and customer loyalty. With particular expertise in **Financial Services** and **Healthcare** among other industries, HCG holistically approaches the customer relationship and associated interactions across the breadth of...

... the Customer Lifecycle:

- Attract
- Convert
- Service
- Extend

...Channels & Touchpoints:

- Web (1.0, 2.0, 3.0)
- Salesforce
- Call Center
- SMS/Text
- Branch/Kiosk
- Advisers/Coaches

...the Core Value Levers:

- Strategy & Insights
- Process
- People
- Data & Technology (e.g., CRM)

Client Services

*Haley Consulting Group LLC is a **management consultancy** that also provides **interim management** and **management recruiting** services under a consult-to-hire model.*



Management Consulting

Traditional consulting services from strategy through implementation management

Interim Management

Individual managers hired over finite, but longer periods of time

Management Recruiting

A consult-to-hire model offers risk-free recruiting at significantly reduced placement fees

Operationalizing the Customer Strategy: Issues

HCG helps clients operationalize their Customer Strategy by identifying and resolving key issues limiting efficiency and effectiveness of customer interactions

- Inability to cross-sell / up-sell effectively across the enterprise
- Marketplace gaps (geography, product, segments, etc)
- Customer profitability not managed actively and/or holistically
- Lack of innovative and differentiated value propositions
- Products fail to meet customer needs and wants



- Poor / fragmented customer knowledge
- Customer experience is spotty and not integrated across channels
- Difficulty of managing relationships via intermediaries

- Inability to compile a single view of the customer (aggregate accounts, etc)
- Inaccurate and fragmented data
- Lack of coordination/point of control regarding customer decisions
- Misaligned metrics
- Gaps in understanding of risk

- Functional silos within the organization with redundant and/or unintegrated systems
- Legacy technology / poor technology enablement
- Cultural impediments to data sharing
- Sub-optimal distribution network
- Unintegrated or undifferentiated client servicing

Operationalizing the Customer Strategy: Analysis Framework

...through a Customer Lifecycle framework that addresses Strategy & Insights, Process, People, and Data & Technology considerations holistically.



Deliver targeted messaging with clear calls to action

Convince the customer to select the Company as their product or service provider

Fully meet customer and account service requirements at optimal efficiency

Expand the Company's relationship with the customer through targeted experiences, communications, and offers

Illustrative Sub-Processes

- Advertising
- Permission Marketing
- Incentives/Promotions
- Affiliate Sites/Services
- Viral Marketing
- Branding

- Identification
- Navigation
- Information
- Communication
- Promotion/Pricing
- Registration/Profiling
- Checkout

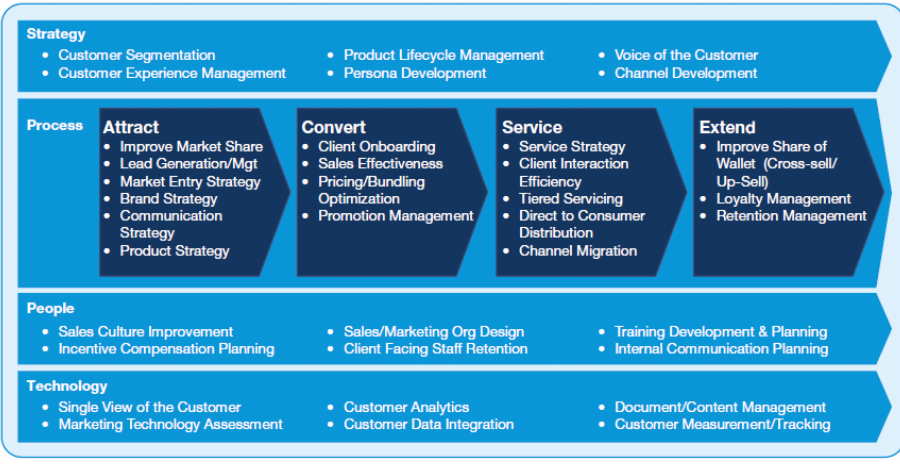
- Authentication
- Authorization
- Billing
- Payment(s)
- Account Management
- Service/Support

- Retention
- Loyalty
- Up-Sell/Cross-Sell
- Save
- Education
- Affiliate Integration

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Operationalizing the Customer Strategy: Illustrative Projects

HCG impacts the breadth of the Customer Lifecycle through discrete projects that build the "mosaic" of the Customer Strategy capability, while individually yielding incremental and defined benefits as well.



Client Experience

HCG has developed specific industry expertise in financial services and healthcare, but has also applied, and continually refined, its customer management methodologies across a breadth of industries and sectors ensuring identification of best practices and the ability to drive cross pollination of those practices.

Client Type	Project
Top 3 US Financial Exchange	Developed the customer experience management strategy and roadmap to conduct enterprise-wide change across organizational, process, and technology areas to improve customer interactions as measured by efficiency, efficacy, and customer experience
Diversified Financial Services Company	Over 5 years lead the team conducting online customer experience management across consumer lending products (credit card, personal loans, home equity, etc) including strategy, process definition, and technology development. Recognized by third parties as "best practice" and "best of breed".
Large Regional Health Plan	Developed the customer engagement strategy and roadmap and co-led implementation. Led/facilitated development of foundational elements of the customer engagement capability to include servicing organization design, integration across sales, servicing, and medical management, Web strategy and channel development, member engagement attitudinal segmentation, single view of the customer, e-mail channel development, and voice of the customer program.
Top 3 US National Trade Organization	For a nationally recognized brand, developed the brand strategy for the main revenue generating product line targeting the organization's business customers. Coordinated the brand strategy with the product development and communication functions.

Practice Lead

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Client Testimonials

"I worked with John for five years while he was ... leader of our agency of record for online marketing and development. John was a trusted and valuable partner. His focus on providing business value to Discover Financial Services was evident in all aspects of the deliverables. As a team we were able to grow the web site and prove it's business contribution to the firm as an effective service, branding and marketing channel. John was always available to me as well as any team member, and ran an extremely efficient practice."
Steve A. Furman, Marketing Director - E-Business at Discover Financial Services

"While at JPMorgan Chase, I had the pleasure of being John's client for a multi-phase business strategy consulting project. During the course of our 18-month collaboration, John demonstrated very strong leadership, project management, strategic analysis, e-Business and implementation skills that contributed materially to securing executive management approval for what became a highly successful new business venture. John is a consummate business professional who consistently delivers positive results,"
Quentin Telep, Senior Vice President, Strategic Development & eBusiness at JPMorgan Chase

John Haley is one of the most agile strategy thinkers I've ever worked with. His background in financial services, healthcare, and technology strategy has given him a 360 degree view of customer engagement. John uses his skills to understand a problem in multiple dimensions and then boil it down to recommend the most practical solution. As CEO of a technology start-up, John's counsel to me was invaluable, trustworthy and his instincts were always dead-on. His advice was worth every penny!
Jason Saul, Chief Executive Officer at B2P Commerce

"I had the pleasure of working with John as a client for a large scale business transformation project. John's insights and deep knowledge of the customer experience and engagement space were invaluable. John is action orientated and results driven. He has strong expertise, works collaboratively within organizational structures, and is an individual of great integrity."
Jill Syracuse, Senior Vice President Servicing at Independent Health

John is creative, insightful, and has an exceptional ability to get things done. This combination allows him to construct and implement alternative solutions in a dynamic work environment that is charged with high pressure and with extremely demanding customers. John's ability to rapidly assimilate relevant issues and think creatively about potential ways around them is an asset that I value highly, and consistently seek out."
Sam Yoo, First Vice President - KYC/AML Operations at ABN AMRO

"John brought a very unique perspective...through his experience and knowledge of building integrated consumer experience from other industries. He was able to take our goal of building an integrated customer experience across multiple channels and build a well thought out strategy that established specific measurable goals and a plan to achieve them. He was very collaborative, brought a different and valuable perspective, and educated us along the way...I strongly recommend John Haley as someone who can help achieve improvements in (customer) engagement which will lead to improved service and financial results."
Bob Hoover, CIO at Independent Health