

# UK FINANCIAL SERVICES EXPERIENCE AWARDS 2017

For more information, contact Ana Belic on [ana@awardsinternational.eu](mailto:ana@awardsinternational.eu) or call 020 7193 5549

## Categories – Making a Choice

### What We Are Looking For

We're looking for you to say to our Judging Panels that *"We implemented a great initiative that has enhanced our customers' experience and our organisation's results - here's the proof and we deserve recognition for it!"*

A "great initiative" might be a project, or group of projects or a broader business initiative that maybe took place over a longer period, not necessarily in a defined project timeframe. It should be something that resulted in a great customer experience (or improvement in customer experience) whilst also benefiting the organisation.

### The Categories

- There are 22 categories divided into 10 Sector Specific categories, 10 Discipline Specific categories and 2 People Specific categories.
- The scoring criteria for all categories are the same - although the content of entries will need to be amended to fit the context of the categories entered – for example, to tell the story from an organisation, team or individual standpoint. Therefore, if you make multiple entries you probably won't be able to simply "cut and paste" the content.
- "The Overall Financial Services Experience Business" prize will be awarded to the highest-scoring entry across the Sector Specific and Discipline Specific Categories.

### How to Choose the Right Categories

#### Sector Specific Categories

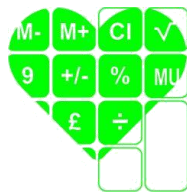
- You should definitely think about making an entry into one of these!
- Choose the category which seems to fit best your industry sector
- Making an exact match to the name of the category is not essential; entries will be judged on the initiative submitted, but the entry needs to reflect the broad meaning of the category title

#### Discipline Specific Categories

- Depending on the initiative, one or more of these categories might be a good fit for your organisation.
- Choose the category which fits your initiative or project.
- There doesn't need to be a direct link between the initiative and the category title, as the entries will be judged on the submitted content. Some link between the initiative and the broad meaning of the category title should exist.

#### People Specific Categories

- These categories require you to mould your entry to the context of the category.
- Choose the category which suits the individual or team best.
- For these categories, we are looking for great initiatives that impacted both the customer experience and the financial organisation. The angle that the story is told from is likely to be different from the Sector or Discipline Specific Categories, however. For example, the entry might be about how one person saw an opportunity, took the initiative and drove the changes to deliver a great financial service training programme that helped the business too.



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## List of Categories

Sector Specific	Discipline Specific
<p><b>Best Business Banking</b> Providing banking services to SMEs or multinationals.</p> <p><b>Best Contact Centres</b> Any type of financial organisation that uses contact centres to communicate with their customers.</p> <p><b>Best IFA</b> The role of the Independent Financial Advisor is key in the regulated environment. IFAs can be large and small organisations or associations of professionals.</p> <p><b>Best Insurance Services</b> Any type of insurance provision including home, life, business, car etc.</p> <p><b>Best Mortgages &amp; Loans</b> Activities related to providing customers with mortgages or personal loans, large or small.</p> <p><b>Best Online Banking</b> Online banks that effectively yield no maintenance free checking, offer high interest rates and friendly free structures, including loans, interest-earning checking accounts etc.</p> <p><b>Best Retail Banking</b> Any type of banking services including savings, loans and current accounts.</p> <p><b>Best Pension Services</b> Any type of pension scheme provider.</p> <p><b>Best Credit Card Providers</b> Any type of bank or company that provides customers with credit cards.</p> <p><b>Best Card Processing Services</b> Any type of company that provides merchant accounts and payment gateways.</p>	<p><b>Best Business Change</b> Specific change made to the business or the business strategy, approach process etc.</p> <p><b>Business Transformation</b> Delivery of a great customer experience through change or transformation of the organisation</p> <p><b>Best Customer Centric Organisation</b> More and more organisations are taking steps to align the needs of customers with everything they do. From putting the customer representative on the board to creating avatars to whole organisational change.</p> <p><b>Best CX Innovation</b> Innovation delivered out of/or in great customer experience.</p> <p><b>Best Employee Engagement</b> Delivery of a great customer experience through people initiative(s).</p> <p><b>Best New Product or Improvement</b> Delivery of a great customer experience through change or addition to products or services.</p> <p><b>Best Risk Management/Consulting</b> Risk management is now used extensively across the financial sector. The need to identify and mitigate risks internally and externally has never been greater.</p> <p><b>Best Use of Insight &amp; Feedback</b> Listening to customers and making high impact use of the knowledge gleaned, providing customer insight gathering and sharing services etc.</p> <p><b>Use of Social Media</b> Social media is used increasingly as part of the overall CX journey and can be pivotal in retention and engagement.</p> <p><b>Use of Technology</b> Delivering great customer experience via the use of technology.</p>



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## People Specific

### Financial Services Professional of the Year

Someone who has identified and responded to an opportunity that has resulted in a significant impact on the customer experience and, as a result, the organisation.

### Financial Services Team of the Year

A team that has identified and responded to an opportunity resulting in a significant impact on the customer experience and, as a result, the organisation.