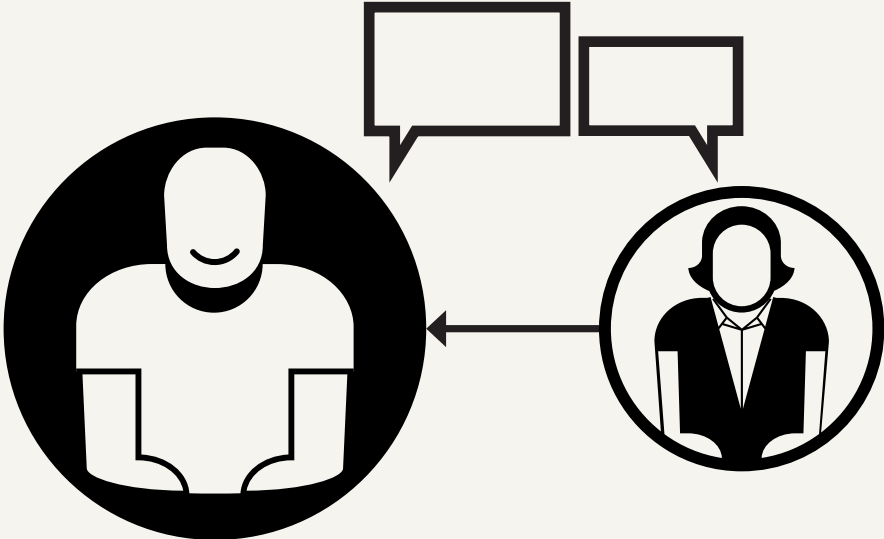


What is First Engagement?



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We introduced the term *First Engagement* in an effort to transfigure the concept of the “concierge” and to drive a hospitality-type behavior in retail banking. The drive for a high-touch engagement in retail banking lead to the adoption of a concierge role within the branch space. We always found this term problematic because it is the wrong reference. A concierge is a subsidiary role in hospitality, it is not the first contact, nor is it even a common part of the hotel arrival sequence. There is a general understanding of the term that can be beneficial, but in our observations and assessments it was creating more confusion than good.

The second challenge we identified was that the role often was interpreted as a greeter. In our observations, this was the most common misunderstanding. We observed two scenarios. Acting as a greeter, the person would stand near the entry door and do little more than say “hello” and “goodbye” to guests. The other scenario, acting as a host and often sitting behind a desk, they would passively wait for customers to approach them, at best also saying “hello” and “goodbye.”

When we first began crafting new service design for a shift to advisory-first and hospitality type engagement, we considered many different conditions and terminology. We were building a new condition—a new choreography of all the staff within the branch space—and we needed a language to communicate the new choreography.

At first we used sports metaphors, specifically football, such as a running-back and quarter back, but sports metaphors have limited success. Then we began using the term “air traffic controller;” a term we continue to use but as part of the explanation of the role and not as the specific title. The air traffic controller could be understood as managing all the flow of people in the branch, ensuring that everything moves smoothly. But it still was not the right term and role.

As part of our diagramming, we began to use sequential terms of first, second, third, etc., referring to different stages of engagement. In the traditional, or previous, branch scenario a guest may encounter multiple people during their trip, depending on the purpose. Each engagement was a successive step of getting them closer to their resolution; beginning with a receptionist, then maybe a teller or banker. Most interactions had up to two engagements. In the new condition, especially when implementing a universal teller role, there may still be multiple steps to the guests’ journey, but now one individual may be handling more than one step, if not all. It was less about roles and more about “plays,” going back to the sports

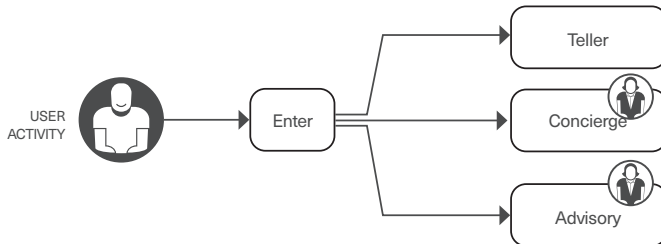
What is First Engagement?

metaphors: if this happens then do this, or this, if this then hand-off to them, or if this then engage this other resource. We began to use the term *First Engagement* to refer to the first contact and interaction with the understanding that is was step one in the interaction of a series of steps.

The First Engager (FE) is not a designated role, it's a way of being, a way of choreography in the branch space. This is a very cursory introduction, and our service documents have extensive explanations and diagramming of what the FE is and how the condition works which I cannot go into here. It requires well documented service guidelines and good training to be effective. When implemented well, it fundamentally changes the condition in the branch space. It greatly improves the customer/member experience, improves efficiencies, and increases staff energy and moral. First Engagement is a new type of service engagement that redesigns the choreography and flow of the branch around the first contact with customers/members.

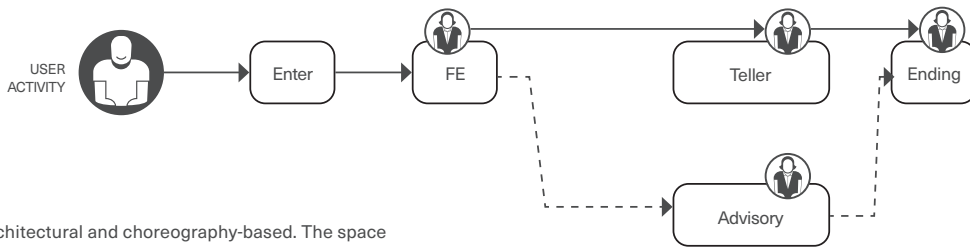
What is First Engagement?

Concierge condition:



The concierge choreography tends to have the member initiate first engagement.

First Engagement condition:



The shift is architectural and choreography-based. The space layout is adjusted to allow for longer engagement at the FE, and centralizes the FE as the first contact for guests. The staff choreography changes to a *cycling* program whereby the FE is universal in their ability to fulfill member needs, and staff cycle through the FE position. Engagement centers around the FE rather than around the teller.

The FE has a multi-dimensional role and is trained in a hospitality level engagement.

Design Made Shorts are brief articles on change and design by Founder & Chief Designer Brock Danner. See our website for more: designmadenyc.com