



Anguilla Finance

Committed to Growth & Development

Presented by

Steve Garlick

Chief Executive Officer





2012 - The Year in Review

Building on our strengths...

Funding

Research

- Jurisdictional Reviews

Development

- Joint Financial Services Legislation Committee

Marketing Support

- Brochures
- Website

Marketing

- Editorials
- Advertising
- Conferences and Exhibitions



2013 – A Year of Opportunities

Geographic Interest

- Latin America (nb Curaçao)
- Far East
- US
- Europe

Products

- Company Incorporations and Management
- Trusts, Funds and Foundations
- Captive Insurance
- Other Niche Markets



2013 – A Year of Opportunities – cont'd.

The Marketing Approach

- Wholesale or Retail?
- Branding
- Intermediary Interaction
- End User

Marketing Responsibilities

- Anguilla Finance Direct to the audience
- Advertising
- Editorial opportunities
- Conferences and Roadshows
- Incoming enquiries
- Links to the high end tourism market

Marketing support for your marketing



What are we selling?

Good Regulation... and hopefully getting better.

Good Reputation... if a little unknown.

Good Service Providers... and getting better.

... And excellent Client Service!?



So how can we prove and evidence a better level of client responsiveness?

We must provide responsiveness to a level that the UK and US (and others) expect and demand.

We must pledge to provide that level of service...be proud of it... and sell it to clients.

...A new initiative from Anguilla Finance in conjunction with Clientell, who have been providing services of this nature to many industries, with significant success over many years.

Can I introduce Melinda Goddard, the principal of Clientell Consulting.



Anguilla Financial Services Client Care Programme A Commitment to Client Care

Presented in partnership with...

Melinda K. M. Goddard, Principal

ClienTell® Consulting, LLC

www.Clien-Tell.com

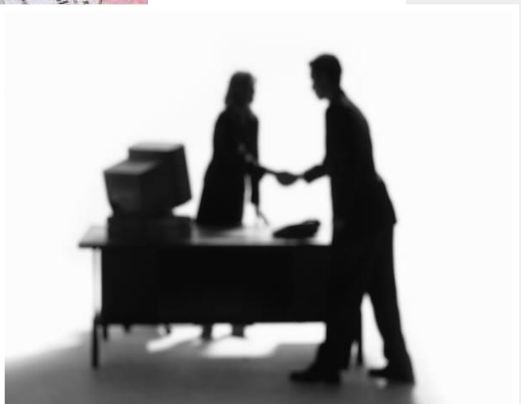




Anguilla Financial Services Client Care Programme

A mark of distinction for our jurisdiction

The Anguilla financial services jurisdiction is sufficiently concentrated to provide *personalised “high end” service*, consistent with our tourism colleagues’ approach to excellence.



The client care programme establishes shared service standards for client *responsiveness* and *support*.

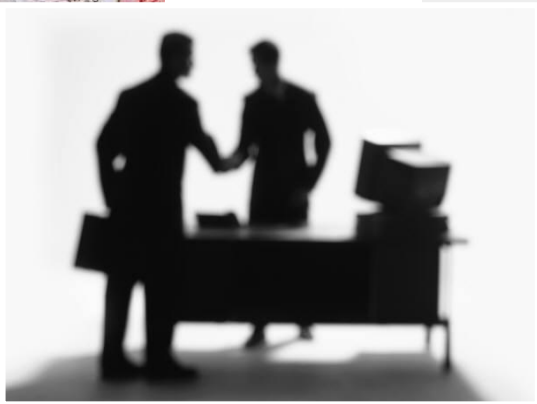


Service Level Pledge Programme Objectives

Prosperity through enhanced client and employee loyalty

The objectives for this programme are also similar to those shared by our hospitality sector in a commitment to service:

- ❧ *Prosperity through enhanced client satisfaction, retention, and referrals*
- ❧ *Staff satisfaction from client appreciation and elegant, efficient interactions*
- ❧ *Enhanced efficiencies and quality from loyal, more productive staff*
- ❧ *Long-term profitability from incremental established client business*
- ❧ *Referrals of new client business from loyal client base*





Service Level Pledge Programme Benefits *...to participating firms and jurisdiction*

Firms making the commitment to follow the client care standards and completing the Pledge process will benefit from:

- 🏆 *Service Level Pledge Guide and Audit Documentation*
- 🏆 *Service Level Pledge Companies Listing*
- 🏆 *Service Level Pledge Companies Certificate*
- 🏆 *Use of Pledge emblem on firm communications, websites*
- 🏆 *Optional support: service quality training and/or on-site audit assistance...*



Anguilla Financial Services Client Care Programme The Service Level Pledge





Service Level Pledge Programme Standards

*10 Competencies for Service Level Pledge**

Participating firms will “pledge” to meet or exceed specific service standards for the following 10 client interactions:

1. *Phone Greetings during Business Hours*
2. *Personal VoiceMail/Out of Office*
3. *Phone after Business Hours/Holidays*
4. *Alternative Coverage/Greeting if VoiceMail Potentially at Capacity*
5. *Returning Calls*
6. *Email Correspondence/Out of Office*
7. *Managing a Moment to Assist*
8. *Introduction to a Colleague*
9. *Delivering Services as Needed and Promised (including Timely Invoicing)*
10. *Excellent Endings: Farewell, follow-up, always invited to return*



Service Level Pledge Programme Example

Phone Greetings during Business Hours...

For example, ensuring that:


1. Every business phone is *answered* by the third ring, preferably by the first.
2. A *cordial greeting* is always offered with specific elements:
 - a. Appreciation for the call
 - b. The firm name
 - c. Employee name
 - d. An offer to assist, such as...

“Thank you for calling X Company. Donnette Smith speaking. How may we assist you?”



Service Level Pledge Programme Process

Documentation: Service Level Pledge Guide...

1. Service Level Pledge Guide and “Audit” Records
 - Download template *from Anguilla Finance Ltd (AFL) website*
 - Service Level Pledge Guide: *Details for establishing Greetings, Procedures, etc. for each competency.*
 - Member specifics *(e.g., firm, customer contact employee listing, etc.)*
 - Pledge template/audit schedules *(e.g., confirmation of role play/demonstrated competency for each standard by every employee; out of office email message printouts, etc.)*
- 



Service Level Pledge Programme Process

Audit...

2. Audit Certification

- Entity designates *audit leader* (to complete audit)
- *Signs off on competencies* and documentation for the company (per audit guide and standards)
- *Forwards to Anguilla Finance* (to register pledge)





Service Level Pledge Programme

Registration as participating firm...

3. Anguilla Finance Ltd (AFL)
 - *Registers firm* as participating in Pledge programme
 - *Forwards emblem* via email
 - *Sends pledge certificate* (suitable for framing)
 - Adds to Service Level Pledge *listing on website*





Anguilla Financial Services Client Care Programme Training and Support...





Service Level Pledge Workshop

Available, optional training and audit support...

1-Day Service Level Pledge Workshop

Optional standards and audit coaching workshop.

- *1-day, on-site workshop with principals and staff*
- *Facilitate audit for competencies certification*
- *Customisation of greetings, etc. for specific firm*
- *Practice demonstrating and document interactions;*
- *Prepare and enter email/voice mail messages in systems, etc.*
- *Pledge audit preparation and coaching (e.g. approved greetings, email absence printouts, demonstrated/observed skills, service procedures, etc.)*
- *Note: Group classes to be offered, based on demand.*
- *Fees: \$1,500US per class (up to 10 participants; \$100US pp > 10); group sessions, \$150pp (minimum of 10 per class)*




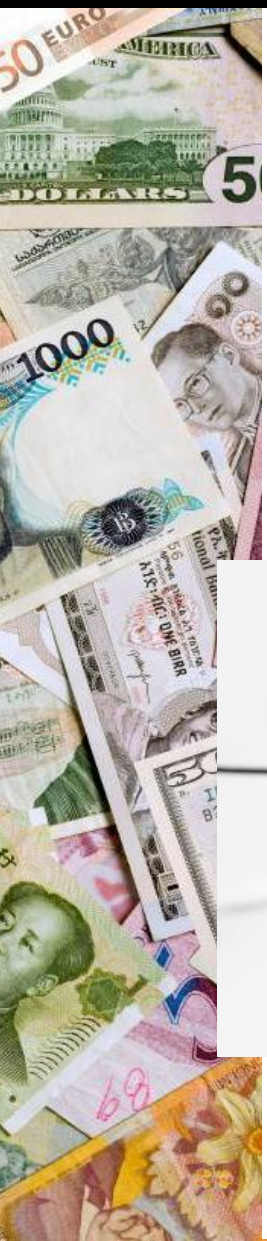
Comprehensive Service Level Pledge Workshop

Available, optional training and audit support...

2-Day Comprehensive Service Level Pledge Workshop

ANGUILLA PRIDE™ Client Care *and* Pledge Workshop

- *2-day, on-site workshop with principals and staff*
 - *Pledge audit preparation and coaching (e.g. approved greetings, email absence printouts, demonstrated/observed skills, service procedures, etc.) included in 1-day class, plus...*
 - *Business rationale for service excellence, customer recovery process, and service quality training beyond Pledge basics*
 - *Note: Group classes to be offered, based on demand.*
 - *Fees: Workshop training (all standards), audit preparation and coaching: \$2,500US per class (up to 10 participants; \$200US pp > 10); group sessions: \$250 pp (minimum of 10 per class)*
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Additional Service and Support

By request...

Service Level Pledge Proficiency Exercises

*Service Level Pledge reinforcement based on needs to enhance skills (e.g., addressing specific requests, service issues, emails, etc.); resources for staff review/proficiency.**

Staff Meeting “Refresher” Workshop

*Service Level Pledge discussions, role plays, contests; customised to needs/client feedback.**

Greetings and Email Random Audit

*Summary report based on random audit by request to assess compliance with Service Level Pledge.**



Additional Service and Support

By request... (continued)

Anguilla Finance Client Survey

*Participating firms would control client lists/email invitations and reminders (electronic invitations/e-survey direct links, only), allowing a balance of shared fees and confidential lists/results.**

Fees/services:

To be customised and provided as agreed, upon request. Survey to be based on consensus for measurement and feedback and minimum of four “charter” sponsors.





Anguilla Financial Services Client Care Programme Next steps...

Service Level Pledge Standards
Presentation and Discussion

November 19, 2012 @ 8:30 A.M.

Wallblake House, The Valley

