

# pivotal360° CASE STUDY

## Leading Financial Services Firm

### Situation:

- Board of Directors recognized **importance of reputation** to manage global firm and realized they had minimal corporate level information
- Client base of top executives (CEOs, CFOs, top fund executives) created **hard to survey audience**
- **Reputation managed in individual departments** with minimal overlap of metrics and information sources

### Testing:

- Designed **global assessment** to simplify process and replace complicated multimillion-dollar **effort existing within individual departments**
- **Continuous assessment of eight stakeholder groups** focused on personalized invitations and relationship building to increase response rates among difficult to survey top executives

### Outcome:

- Executive management now has **consistent information for decision-making** across all departments
- Launched expanded efforts in their recruiting and alumni programs to establish channels and create **consistent company message to these key stakeholders**
- Multiple corporate citizenship **programs launched** with campaigns to promote their visibility to key stakeholders

