

### CATEGORY

## SOCIAL PROJECT OF THE YEAR

### WINNER

## SPECIALIST SUPPORT PROJECT – NATIONWIDE BUILDING SOCIETY

### SPONSOR



# PROJECT

### Overview

Nationwide Building Society and Macmillan Cancer Support have been working together since 1993 to provide support to people following a cancer diagnosis. During this time, Nationwide has raised more than £7.1m to improve the lives of people affected by cancer.

Macmillan's Counting on Your Support report found that 95 per cent of cancer patients do not contact their bank or building society when faced with financial difficulty for fear of not getting any help. The report set out recommendations to the financial industry to ease the financial burden of cancer, a challenge that Nationwide's

executive committee decided to take up.

Against a challenging timeline, the partnership of Nationwide and Macmillan developed the Specialist Support Project, an industry-first bespoke service for Nationwide customers impacted by cancer.

### Innovation

Nationwide's aim was to provide an outstanding customer experience and outcome to this group of customers. A Specialist Support Team would provide case-managed assistance, supported by highly trained frontline employees who can refer customers to services and a suite of product and policy exceptions to support individual circumstances.

By making the solution scalable, the aim would be to eventually extend the service across Nationwide and to other vulnerable customer groups.

Finally, a blueprint would be created that could show the financial services industry how this service could work.

### Resources

Members of the project team were sourced from all units of the business to ensure input and collaboration across all impacted areas. An initial workshop assessed the project's objectives and people's motivations to be involved, so that the team could be defined and individuals tasked to roles where they could bring the most value.

On Friday 25 September 2015, the 25th anniversary of Macmillan's World's Biggest Coffee Morning, 691 employees and members came together in Nationwide House to break the Guinness World Record for holding the largest cream tea party



# WINNER'S

## CASE STUDY



By partnering with Macmillan, the team at Nationwide could combine its project management and financial services experience with the charity's research and subject matter expertise to deliver a service that was fit for purpose.

### Challenges

Buy-in and engagement from Nationwide's executive committee meant that delivery expectations were huge. The project had a challenging timeline of just five months to pilot launch. However, due to the efforts of employees across the business who contributed in addition to their 'day jobs', the deadline was achieved.

There is much potential to improve services for members impacted by cancer; however, trying to achieve too much could lead to failure. Therefore, the scoping of the project was kept small and simple to be trialled, adapted and refined as necessary – with an aim that it should be scalable.

As cancer is a very sensitive subject, communication was key to ensure customer-facing employees had an understanding of the service and were inspired by the difference they could make to customers.

### Coordination

The project established a customer voice panel made up of Nationwide employees who had been impacted by cancer to shape and develop the proposition. A communications strategy was developed for the pilot, which included short films featuring

customers and members of the specialist team, a branch champion network, regular distribution of success stories and project team attendance at branch roadshows.

Regular updates were provided to the executive committee to ensure the project was fulfilling the commitment it made to Macmillan. In turn, this maintained its buy-in and cascaded to its senior team, resulting in significant support across the business.

Collaborative working on a referral process and technology solution created a two-way referral process between Macmillan and Nationwide. This enables customers to benefit from the experience of both organisations, regardless of which one they contact first.

### Project successes

Following completion of the pilot phase in October 2015, the decision was made for the specialist service to be rolled out permanently across Nationwide's entire business.

More than 1,000 Nationwide customers have so far been supported by the service. More than 200 customers have been referred back to Macmillan, leading to over £140,000 of additional benefits and grants.

Nationwide is developing the service offering to other vulnerabilities and long-term conditions, including heart disease and mental incapacity. Macmillan is also using the service as a practical example of how it and the financial services industry can work together to help people affected by cancer.





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