



HUNTSWOOD

A ResultsCX Company

Supporting a UK Building Society by designing and implementing a New Outcomes Testing Framework



Challenge

A leading UK building society needed a comprehensive outcomes testing framework covering core products—investments, protection, mortgages, and retail banking—to ensure compliance and deliver consistent, customer-focused results.

Solution

Benchmarked outcomes - Huntswood began by conducting a thorough 'current state' review across the building society's operations. This included detailed interviews and process walkthroughs with staff to understand existing practices. We benchmarked the firm's customer contact processes against regulatory expectations, particularly Consumer Duty—and industry best practice.

Our assessment covered all critical elements: sampling methodology, customer detriment remediation processes, scripting, appropriateness of outcomes testing activities, MI reporting standards, and internal control mechanisms. By identifying

gaps and strengths, we provided a clear roadmap for improvement and designed a framework that ensured compliance while enhancing customer experience.

Defined customer journeys - We mapped the end-to-end customer journey for each regulated product, defining clear customer outcomes and embedding them into a robust post-sales outcomes testing framework. This ensured consistent, outcomes-focused checks across the business. Additionally, we created a structured operating environment through new scripts, policies, processes, procedures, and MI specifications to support effective customer contact and governance.

Outcome

After completing the design phase, we recruited and deployed a permanent team to execute the outcomes testing framework, ensuring a seamless migration and supporting a smooth, timely transition to BAU operations.