

From Service Providers to Trusted Advisors

In 2019, NICE Actimize Professional Services (PS) kicked off a project to help the team become even more client-centric. The goal was to continuously deliver value across the entire client journey and become the go-to financial crime and compliance trusted advisors.

The Challenge

- To help introduce a new mindset and behaviors that create a stronger client relationship experience.
- Develop the learning pathway and equip associates with the skills to be best-in-class trusted advisors.
- To keep up with the growing demand of NICE Actimize growth and the PS business in a consistent, profitable and client-centric way.



The Solution

This Professional Services project took place over eight months, beginning with an organizational needs assessment where internal and external stakeholders were interviewed. The process concluded with over 30 workshops held globally for more than 500 members of the PS organization.

During the workshops, participants learned **why** this change was important, **how** to implement it and **what** we must do to create and sustain a trusted partner status with all clients.

The team used real-life scenarios to embed new ways of doing things around topics such as active listening, use of positive language and elements of building trust with our clients.

To celebrate the company's commitment to excellence as trusted advisors, each course concluded with a signature of commitment to the practices learned, a graduation ceremony and a personal video each associate filmed about their journey ahead.

Moving Forward

Long term, NICE Actimize will continue to build upon these trusted advisor practices with tools for recognition, such as Make a Difference post cards, in office posters and a trusted advisor recognition award. The team continues to participate in ongoing, focused training.

The Impact

- Improved service experience for clients
- Investment and training in elevation of skillsets across global PS organization
- Pave the way for other internal groups to become Trusted Advisors, strengthening internal interfaces between product, sales and client support

500 Professional Services associates were trained, including:

Project managers, business analysts, software engineers, business eCAP consultants, solutions architects, sales team, customer support and education services

The training took place across five regions: Americas, EMEA, APAC, Israel and India.



“The skills and behaviors taught to NICE Actimize professionals enable us to develop better client relationships and build stronger bridges across various groups within our own organization. We are investing in our people and our customers with this mission in mind.”

“The mindset shift from technical service providers to trusted advisors is a critical journey in our transformation to become the go-to, best-in-class, financial crime and compliance partner in FinTech.”

-Chad Hetherington, VP of Global Services

Interested in working with our Trusted Advisors? [Learn more here.](#)