



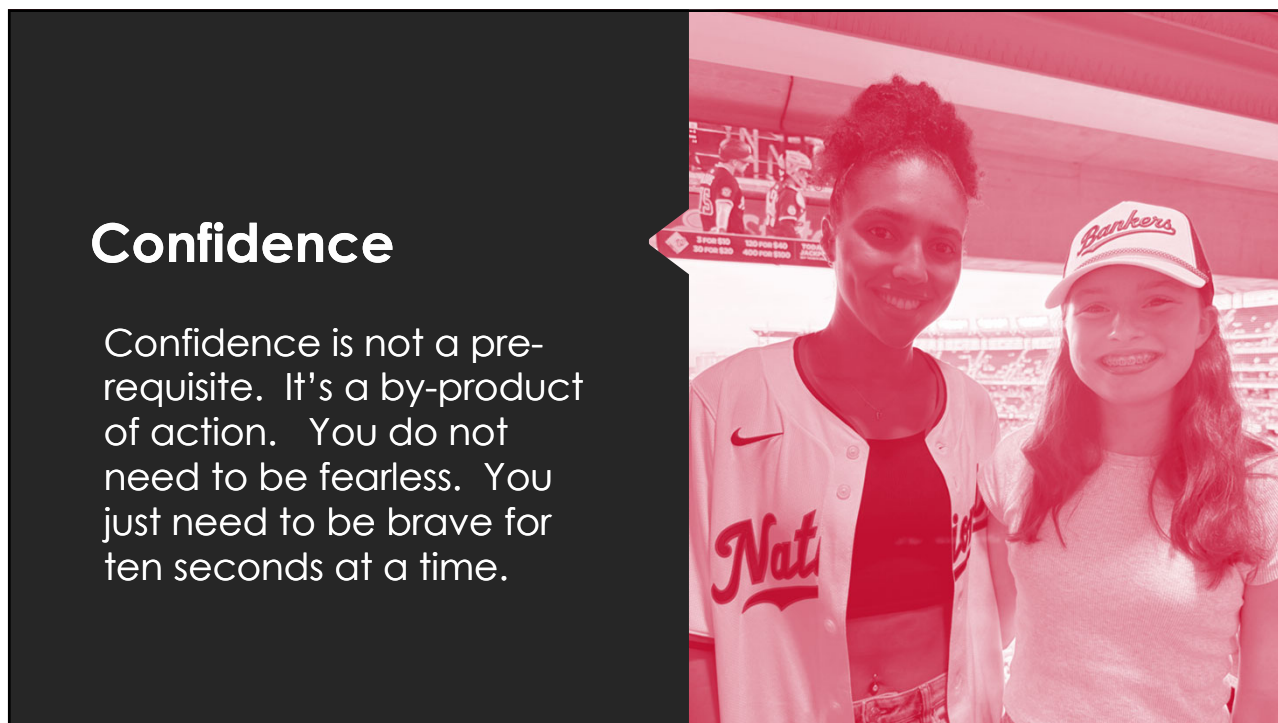
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How do you want someone to feel  
when they receive an email from you?  
When someone leaves a meeting with  
you, what do you want them to say?

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## The Power of Saying Less

**Subject:** Strategic Engagement Required on Escalated Client Sentiment Team,

In the interest of sustaining our reputation for client-centric excellence, I am elevating for collective visibility a material escalation originating from a high-net-worth customer whose experiential journey has recently deviated from our service model.

The client has articulated significant dissatisfaction regarding the protracted cycle time for resolution of a service inquiry, coupled with perceived opacity in our communication cadence. This has created a negative sentiment trajectory which, if not re-baselined with urgency, risks eroding long-term relationship equity and wallet share. There were several failures here, from multiple teams.

Our objective must be to leverage cross-functional synergies between Customer Service, Wealth Management, and Operations in order to architect a holistic remediation pathway. This should encompass both tactical interventions to immediately address the client's unmet needs, as well as structural enhancements to our client experience framework to prevent recurrence.

Accordingly, I request that each team contribute actionable insights and client-touch strategies by tomorrow morning, so we can convene a strategic huddle and converge on a unified client re-engagement narrative.

Warm regards,  
[Name]  
Fanciest Title You Can Imagine

CC: CEO



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## Situation. Obstacle. Solution.

Team,

Sue Storm has recently expressed concerns about her online banking access and the miscommunication that occurred. She is locked out of online banking, so let's work together to do this:

- Reset Sue's online banking password
- Contact Sue personally today
- Check for the process gaps to prevent this from happening again.

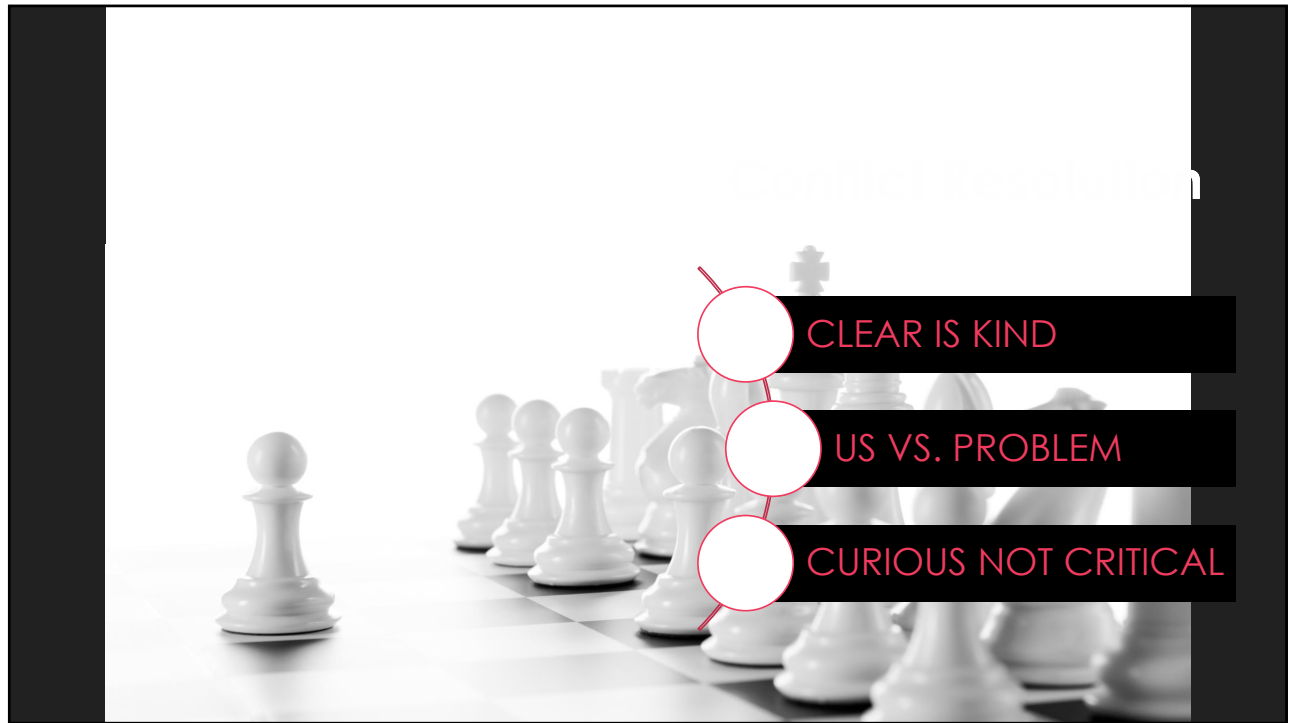
I'll put ten minutes on our calendars for this afternoon to make sure we're all on the same page. Thank you for your help!

Kristina

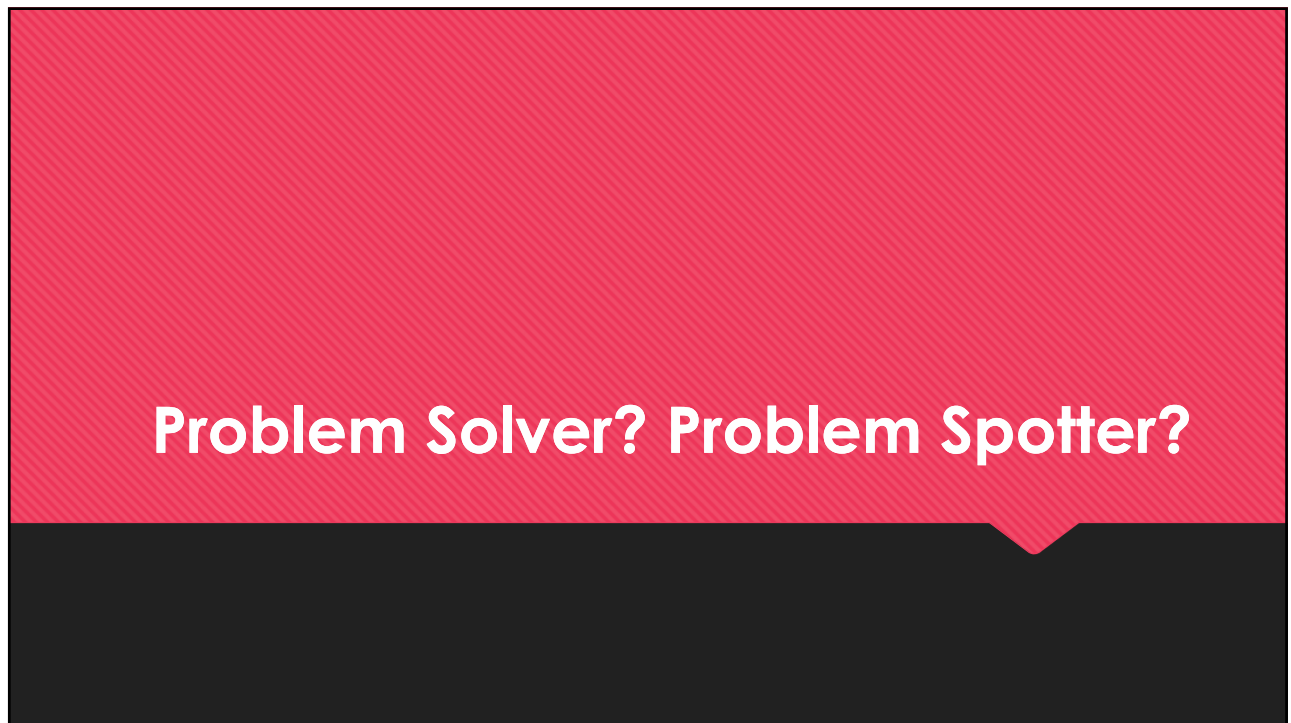
PS - I'm looping in Karen as I know she has a standing fee time with Sue on Tuesdays – and Sue may mention it.



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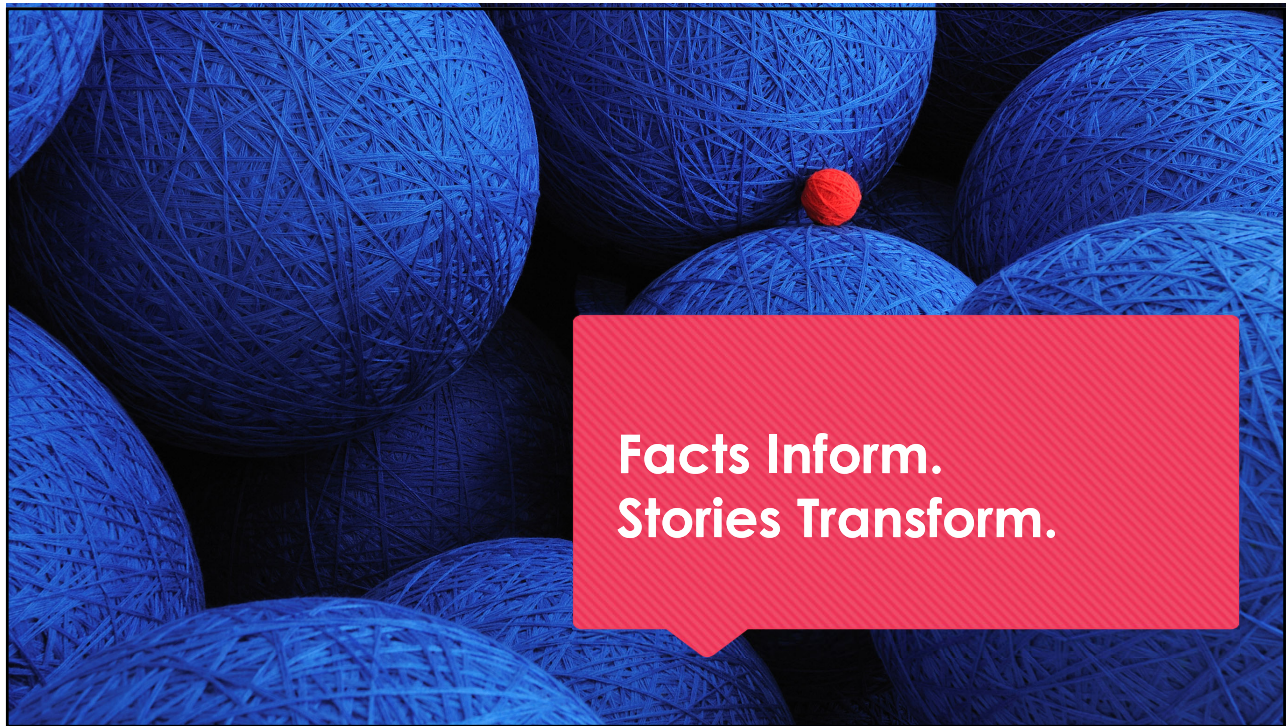
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The Elmwood branch has been operating short-staffed for the past several weeks. One banker is on parental leave, one recently resigned, and another is out intermittently due to illness. The branch manager, Lisa, is covering multiple roles: lobby coverage, operations, and managing team morale. Customers have begun complaining about long wait times and service delays. Lisa has made several requests to her retail leader, Michelle, for staffing support or float coverage. Michelle has explained that all local branches are short-staffed and the floaters prefer to work at the Key West branch. Lisa recently sent a frustrated email saying, “I don’t feel heard — I’m doing everything I can, but this isn’t sustainable.” Michelle feels she’s been advocating for the branch behind the scenes, but Lisa doesn’t acknowledge those efforts.

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A customer, Mr. Daniels, called the contact center to report several unauthorized Zelle transfers from his checking account totaling \$4,500 over a 48-hour period. He said he received a text message claiming to be from the bank’s fraud department, asking him to confirm a suspicious charge. After replying “No,” he received a phone call from someone claiming to be from the bank. The caller knew his name and partial account number and asked him to verify some personal information “to secure the account.” The caller walked him through steps in online banking to “reverse” the transaction — this included sending money via Zelle to what he was told was a “temporary holding account.” He later received a legitimate fraud alert from the bank but ignored it, thinking it was a duplicate of the earlier message. He admits he gave the caller a one-time passcode during the call, believing it was required to “cancel the fraud.” He filed a report with the bank after noticing the transfers and being unable to reach the original caller again. His Zelle limits were not exceeded, but he did not receive any of his system-generated online banking alerts given the dollar threshold of the transaction.

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**Facts Inform.  
Stories Transform.**

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**How to be  
authentic  
without  
oversharing.**

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Why am I sharing  
this?

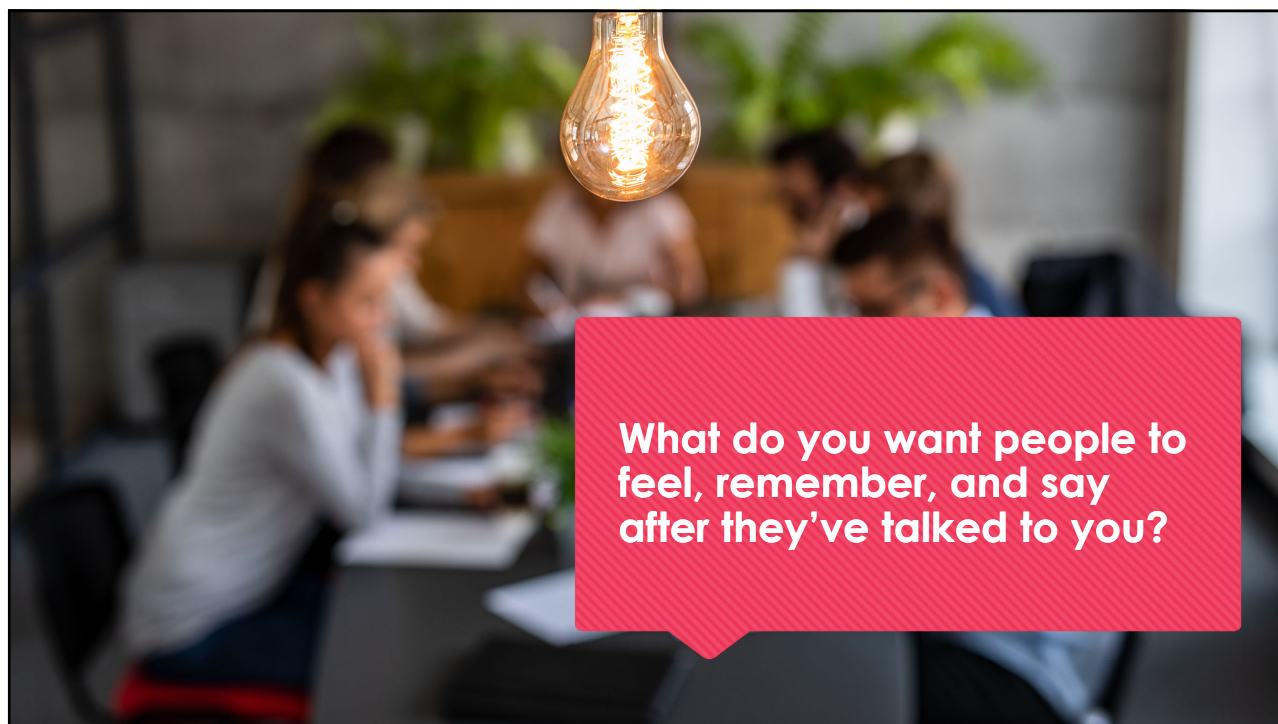
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Share the scar, not  
the wound.

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Consider the  
audience.

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