



## SWAN GENERAL LTD

*Reaching Service Excellence*

Established in 1855, SWAN has transformed from selling financial products to serving customers as life long partner for a wide range of non-banking financial solutions. In 2015, SWAN unified with a common purpose and united under a single brand.

SWAN chose Uplifting Service as their partner to provide service education workshops and course leader certification to deliver the service program to all employees, including a customized e-learning program.

Service culture building blocks activities have been implemented by cross-functional teams in multiple areas, including Service Communications, Voice of the Customer, New Staff Orientation, and Service Measures and Metrics.

### UP SERVICE TOGETHER

Recent improvements in key perception points include a centralized call center, simplified proposal forms, redesigned website, reduced paper dependency, and better time management.

'Ideas Box' project gathers service improvement ideas that 'can be done quickly' and those that 'require more time and resources'.

Revised orientation program teaches common service language so new team members can quickly learn shared service principles.

Steering Committee implements new actions based on ideas raised during the service education workshops.

***"We have embarked on a daring customer service program to challenge every staff member to deliver best in class service and reinforce a culture of respect across the company."***

MR LOUIS RIVALLAND  
Chief Executive Officer

## SWAN

### CLIENT

Swan General Ltd

### PROFILE

Swan General Ltd is the leading financial solutions provider in Mauritius for short-term and long-term insurance, retirement plans, wealth management and stockbroking for corporate clients and individual customers.

### VISION

To be the preferred financial services solution partner for life

### IDENTITY

SWAN delivers value through "The Pyramid of Prosperity" to Protect with coverage, Provide investment advice, Progress towards goals, and Prosper customers to flourish.