

Allied Universal Enhances Security Program with Customer Service Specialists

Waddell & Reed, Inc.

Situation: For more than seven decades, Waddell & Reed, Inc. has helped millions of individuals develop customized financial plans, getting them to where they want to go in life. Waddell & Reed's roots date back to 1937, and the company is now known as one of the most established mutual fund and financial planning companies in the country.

Today, Waddell & Reed provides financial planning services to clients throughout the United States through its network of nearly 1,900 financial advisors. Based in Overland Park, KS, the recently refurbished Waddell & Reed complex, located in Waddell & Reed Park, is dispersed among four buildings. Waddell & Reed Park is also home to other commercial office buildings not associated with Waddell & Reed, Inc.

"Allied Universal has been a trusted security provider for Waddell & Reed for more than 10 years," said Kevin Gilgour, operations manager for Allied Universal. "We have shared a strong dedication to security."

Challenge: A high volume of guests and clients enter the main entrance to the Waddell & Reed headquarters every day to discuss their private financial planning goals with representatives. Some include very well-known, high-profile guests who require a higher level of customer service, security, confidentiality and discretion.

"Particular individuals seek a coordinated security effort between the Waddell & Reed security team and their personal security," explained Marge Bass, facilities manager for Waddell & Reed. "I need those special individuals to feel like they are receiving a higher level of security service than expected at most corporate headquarters. These patrons and all of our guests deserve an exceptional customer service experience from the moment they come through the door."

"Our security team is top notch and they need to remain focused on securing our campus, but we saw an opportunity to implement an even greater focus on customer service," said Bass. "Our needs were evolving and we presented this challenge to Allied Universal."

"In reality, the security officers have to interact with the good and the bad sides of people every day," she continued. "Sometimes individuals come into Waddell & Reed happy and excited, and sometimes they are very upset. Our security officers know how to deal with that kind of up and down, emotional and sometimes stressful situation, but we saw a need for additional customer service support as well."

Solution: To meet their changing need for a more customer service focused security officer, Allied Universal created a customized Customer Service Specialist position, specifically for Waddell & Reed. "The Customer Service Specialist has a very distinct appearance and focuses on the high-profile guests that enter the facility," said Gilgour.

Location:

Overland Park, KS

Statistics:

- > Waddell & Reed is one of the most established mutual fund and financial planning companies in the country
- > A large volume of guests, including high-profile clients, enter the complex daily
- > Evolving needs placed more emphasis on customer service



The Customer Service Specialists are the first individuals that guests and visitors encounter at each building. Two Customer Service Specialists are posted at the front desk and are trained specifically to handle the public and high profile clientele. Each Customer Service Specialist must have a specialized background, which can include law enforcement, military service or years of security experience.

The Customer Service Specialists are responsible for coordinating with the personal security teams of high-profile guests. Coordination efforts could entail details about parking, where the high-profile guest should enter the building, and how to move the guest throughout the facility without them being a distraction or disturbed by other guests. "Since these individuals are dealing with financial matters, it is of utmost importance that there is confidentiality and discretion," said Gilgour. "The Customer Service Specialists know how to handle this type of situation."

The Customer Service Specialists are supported by a team of Allied Universal security officers whose jobs are to patrol the interior and exterior of the three buildings and deal with any emotional guests. The security officers are not pulled from important patrol routes to coordinate high-profile visits and the Customer Service Specialists can remain focused primarily on customer service. This cohesive team provides the right balance of customer service and security. All security personnel are assigned specific duties but all understand the greater mission of maintaining a secure, but welcoming environment at Waddell & Reed.

Identifying the right person for each position is an important part of this successful program. "Whether the job opening is for a Customer Service Specialist or a security officer, I involve Waddell & Reed to assist with the interview process," said Gilgour. "Waddell & Reed look at the security officers as though they are part of their own company, so it is important that they are involved in the hiring decisions."

Results: Bass, along with the staff of Waddell & Reed, have a close relationship with the Allied Universal team. "We have never had any complaints about the security officers and each individual on the security team has an eye for detail. Their instincts are impeccable," said Bass.

The Customer Service Specialists are trusted members of the security team. They are relied upon to coordinate the visits of high-profile guests and maintain confidentiality at all times. "It is Allied Universal's duty to provide the highest degree of security and customer service for the facility, employees, clients and guests," said Gilgour.

Creating the Customer Service Specialist position specifically for Waddell & Reed demonstrated that Allied Universal is a committed security provider and true partner. "We were able to present a higher level of security officer with a specialized background to meet Waddell & Reed's demands," said Gilgour. "We understand Waddell & Reed's security goals and are able to adjust our security program to keep pace with their changing needs."

There has also been a low turnover of the security team at the three facilities which has made the relationship even stronger. "The security team is looked at as part of Waddell and Reed," said Gilgour. "Our client is impressed with the high standards of the security and customer service personnel and our ability to implement a specialized service developed for their specific needs. Waddell & Reed knows that we will do whatever we can to satisfy their needs, whenever they arise."

"We saw an opportunity for increased customer service and Allied Universal quickly met that challenge with a customized solution," said Bass