



# CUSTOMER EXPERIENCE EXPERTS

SET STANDARDS. MERCHANDISE. TRAIN. SURVEY.

Brings  
Your Bank

**PerformanceChek™**

A comprehensive,  
customized, turnkey solution  
to bank-wide customer  
service assessments.

[www.customer-experience-experts.com](http://www.customer-experience-experts.com)

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# Project Objectives

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To implement a comprehensive, customized and turnkey program that measures the key attributes of the bank's brand personality and relationship sales culture.

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## Why Implement

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the PerformanceChek™ Customer Experience Assessment System

- Statistics have shown that more than 90% of your customers will not proactively tell you when they are dissatisfied, and often you may not be aware of the 10% that complain.
- Research has further shown that 68% of customers who stop banking with you do so because of an attitude of indifference or rudeness by a bank employee or usability issues with your website or across channels.
- Most of these dissatisfied customers will defect to your competition and will share their negative experience with up to 15 of their friends and family members.
- Considering that it costs six times more to attract a new customer than it does to keep an existing one, retaining your current customers is not only preferred, it is the lifeblood of your bank.

In this highly competitive environment, banks cannot afford to lose any customers to your competition. Our goal is to prevent the loss of your most valuable asset, your hard-earned customer. In fact, our goal is to have them feel so good about their relationship with you that they want to not only deepen their relationship with you, they also are motivated to tell others about your exceptional delivery of financial service and solutions.

When combining these strategies with a Relationship Sales and Customer Intimacy approach, you will build customer loyalty and win new customers with a positive effect on bank profitability.

*As you know, it takes years to gain a customer, but just seconds to lose one.*

**“If it can't be measured, it can't be improved.”**

**– W. Edward Deming**

# Characteristics

## of a Customer-Driven Bank: A Diagnostic Self-Test

Written/Edited: Richard Whiteley, Customer Driven Company; Nancy Draude, Customer Experience Experts

Extensive research has shown that there are forty characteristics of banks that are highly correlated with success in meeting customers' needs. A technique called factor analysis showed that the characteristics break into seven clusters: The characteristics in each of the clusters are listed here. Use this list as a diagnostic self-test for your own organization. It will help you determine where you most need work and where your bank's strengths lie.

PerformanceChek's comprehensive, turn-key custom research is a support program for Relationship Sales driven banks that are serious about deepening long-term customer relationships, offering uncommon service and solutions.

The Diagnostic: For each characteristic, rate the extent to which the statement is true about your organization, using this scale.

1-Not at all

2-To a small extent

3-To a moderate extent

4-To a great extent

5-To a very great extent

Then add up the scores for each cluster in the space entitled Your Score. Next, calculate your percentage rating in that critical area by dividing your score by the highest possible score.

### Analyzing Your Organization and Addressing Its Problems

After calculating your percentage score in each cluster, look at where you are high and where you are low. The following principles will lead you toward opportunities for improvement:

- Create a Customer-Keeping Vision
- Saturate Your Company with the Voice of the Customer
- Smash the Barriers to Profitable Customer-Winning Performance (**Relationship Sales Culture**)
- Liberate Your Customer Champions
- Go to School on the Winners (i.e. Seek out Best Practices)
- Measure, Measure, Measure (**PerformanceChek™**)
- Walk the Talk

For more information on these principles, please reference: The Customer Driven Company by Richard Whiteley.

## Characteristics of a Customer-Driven Bank: A Diagnostic Self-Test

### Vision, Commitment, and Climate

- Our organization is totally committed to the idea of creating, sustaining and retaining exceptionally satisfied customers. \_\_\_\_\_
- Rather than having to undo mistakes, we aim to “do things right the first time.” \_\_\_\_\_
- Executives demonstrate with their actions that customer satisfaction and deepening customer relationships is important. \_\_\_\_\_
- Our goal is to exceed the expectations of our customers in the things that matter most to them. \_\_\_\_\_
- Being customer-focused is a major factor in determining who gets ahead in our organization. \_\_\_\_\_
- Our organization is totally committed to the delivery of quality products and services. Quality would be representative of our brand personality. \_\_\_\_\_
- Serving customers’ needs takes precedence in our organization. \_\_\_\_\_

**Your Score** \_\_\_\_\_  
**Divide by a possible 35 (your percentage score) =** \_\_\_\_\_

### Aligning Ourselves with Our Customers

- When it comes to selling, we play a consultative or partnership role with our customers. We follow the guiding principles of Relationship Sales Customer Intimacy. \_\_\_\_\_
- In our advertising and promotional materials, we avoid promising more than we deliver... we consistently meet, and often exceed expectations. \_\_\_\_\_
- We know which attributes of our products or services our customer’s value most. \_\_\_\_\_
- Information from customers is used in designing our products and services. \_\_\_\_\_
- We strive to be a leader in our industry. We have a “best practices” culture. \_\_\_\_\_

**Your Score** \_\_\_\_\_  
**Divide by a possible 25 (your percentage score) =** \_\_\_\_\_

### Readiness to Find and Eliminate Customers’ Problems

- We monitor customer complaints. \_\_\_\_\_
- We have a mystery shopping program in place to be sure we are getting consistent and objective feedback about our performance. \_\_\_\_\_
- Customer comments and complaints are regularly analyzed in order to identify quality service problems. \_\_\_\_\_
- We look for ways to eliminate internal procedures and systems that do not create value for our customers. \_\_\_\_\_

**Your Score** \_\_\_\_\_  
**Divide by a possible 20 (your percentage score) =** \_\_\_\_\_

### Using and Communicating Customer Information

- We know how our customers define “great service.” \_\_\_\_\_
- We provide opportunities for employees at various levels and functions to meet with customers. \_\_\_\_\_
- We clearly understand what our customers expect from our organization. \_\_\_\_\_
- We regularly give information to customers that help shape clear and realistic expectations of what we can provide for them. \_\_\_\_\_
- Our key managers clearly understand our customers’ needs and requirements. \_\_\_\_\_
- Within the organization, there is agreement about who our “target” customer is. \_\_\_\_\_
- Our executive have frequent contact with customers. \_\_\_\_\_

**Your Score** \_\_\_\_\_  
**Divide by a possible 35 (your percentage score) =** \_\_\_\_\_

### Reaching out for Our Customers

- We make it easy for our customers to do business with us. \_\_\_\_\_
- Employees are encouraged to go above and beyond to serve customers well. \_\_\_\_\_
- We try to resolve all customer complaints. \_\_\_\_\_
- We make it easy for customers to complain/comment to us about products and services they may not be completely satisfied with. \_\_\_\_\_

**Your Score** \_\_\_\_\_  
**Divide by a possible 20 (your percentage score) =** \_\_\_\_\_

### Competence, Capability and Empowerment of People

- We treat employees with respect. \_\_\_\_\_
- Employees at all levels have a good understanding of our products and services. \_\_\_\_\_
- Employees who work with customers are supported with resources that are sufficient for doing the job well. \_\_\_\_\_
- Even at lower levels of our organization, employees are empowered to use their judgment when quick action is needed to make things right for a customer. \_\_\_\_\_
- Employees feel they are involved in an exciting organization. \_\_\_\_\_
- Employees at all levels are involved in making decisions about some aspects of their work. \_\_\_\_\_
- Employees are cross-trained so that they can fill in for each other in needed situations. \_\_\_\_\_

**Your Score** \_\_\_\_\_  
**Divide by a possible 35 (your percentage score) =** \_\_\_\_\_

## Continuously Improving Our Processes and Products

- Instead of competing with one another, functional groups cooperate to reach shared goals. \_\_\_\_\_
- We study the best practices of other companies to get ideas about how we might do things better. \_\_\_\_\_
- We work to continuously improve our products and services. \_\_\_\_\_
- We systematically try to reduce our R&D (research-and-development) cycle time so new products are introduced when consumer need is hot. \_\_\_\_\_
- When problems with quality service are identified, we take quick action to solve them. \_\_\_\_\_
- We invest in the development of innovative ideas. \_\_\_\_\_

Your Score \_\_\_\_\_

Divide by a possible 30 (your percentage score) = \_\_\_\_\_

## Analyzing Your Organization and Addressing Its Problems

After calculating your percentage score in each cluster, look at where you are high and where you are low. The following principles will lead you toward opportunities for improvement:

- Create a Customer-Keeping Vision
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- Walk the Talk

For more information on these topics please reference: The Customer Driven Company, Richard Whiteley

**“A Bank needs to know what customers are experiencing and how it impacts their behavior in terms of referability, retention, and returning for additional products.”**

– Nancy Draude, President, PerformanceChek

Why Choose

# Customer Experience Experts

- First and foremost, we are banking specialists.
- We are service fanatics, we practice what we preach!
- Our employees and shoppers are second to none.
- Advanced on-line technology methodologies for real-time reporting 24/7.
- Commitment to quality, ethics, and confidentiality.

*Banking expertise...it makes a difference*

**Owner and founder, Nancy Draude is a 20+ year Bank Marketing Professional and her company is dedicated to banks and their customer experience issues.**



Having over 20 years experience as the Senior Executive in charge of sales and marketing for multiple business units and subsidiaries for a high-performing bank, in 2000, Nancy Draude started Customer Experience Experts because she had a goal to help other banks and customer focused companies achieve their goals!

Owner of Customer Experience Experts Group, Nancy is a professional business coach and consultant specializing in sales and marketing success strategies for the banking industry. She started her business because she is dedicated to helping banks create positive memorable customer experiences.

Believing “What gets measured gets done” Nancy established a division of her company called PerformanceChek. PerformanceChek is dedicated to providing clients with state of the art customer experience assessments, including mystery shopping programs, designed to give timely, constructive and meaningful feedback that will result in actionable recommendations to improve customer relationship sales performance.

Nancy is quick to emphasize that business ethics and demonstrating a genuine concern for those banks she has the privilege of helping is important to her.

## **Knowledge of the Banking Industry: Advanced and Graduate Level Banking Degrees**

Nancy Draude, founder and owner of Customer Experience Experts, will apply advanced bank marketing educational background to benefit your bank. Her educational background includes:

- Degree in Business Administration/Marketing – Grove City College (1979)
- School of Bank Marketing – University of Colorado (1982)
- Leadership Lancaster – Core Program (1986)
- Central Atlantic Graduate School of Banking, Bucknell University (1987)
- Stonier Graduate School of Banking – University of Delaware (1994)
- Advanced Database Marketing School for Banks – Northwest University, Chicago Illinois (1995)
- Leadership Effectiveness Training Certification (L.E.T.) – University of Arizona/Gordon Training (2002)
- SASSIE (Scheduling and Shopper Survey Internet Engine), Surf Merchants Inc., Advanced Mystery Shopping Technology Certification, Boston, MA

**Client Intimacy: Nancy Draude, Senior Bank Marketing Professional, will personally work closely with you and your team.**

You will not be passed off to a project manager or account executive who is not a bank marketing professional. Although Nancy has a qualified team of project managers, research interviewers, etc., the mission of Customer Experience Experts is to work intimately with a limited number of financial institutions, helping them with a wide-range of customer experience support services.

Bank career experience includes, but is not limited to:

- Marketing management/sales management/champion of customer sales and service
- Write and execution of detailed Business plans
- Market research and analysis
- Market growth/segmentation strategies and approaches
- Revenue generation/Profit Quadrant Mapping (P.Q.M.)/cost benefit analysis
- Trainer/speaker
- Project and product management
- Brand management
- Consistent track record for managing significant budgets
- Ability to work well with diverse inter-company departments and audiences.

### **The Customer Experience Experts Team**

Nancy has a team of professionals that work for Customer Experience Experts to provide the highest level of service to their clients.

We do not tolerate:

- Poorly qualified shoppers or customer interviewers
- Poorly written reports
- Poor communication with our clients

Many members of the Customer Experience Experts Team are also bank-issues savvy, with vast experience in the banking industry. Bottom line...we specialize in banks and are quality focused.

Clients are welcome to meet the team assigned to their project. They are all committed to one thing...you!

**“PerformanceChek creates an awareness on the part of employees that their actions count and can have a serious impact on the growth and success of the business.”**

**— Susan Dunn, Vice President/Project Manager, PerformanceChek**

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# Introduction To

**PerformanceChek™**

## Helping Banks Optimize Performance and Profitability within a Relationship Sales Culture

PerformanceChek creates an awareness on the part of employees that their actions count and can have a serious impact on the growth and success of the business.

### What we measure

We measure SPECIFIC BEHAVIORS and EXPERIENCE ATTRIBUTES YOU IDENTIFY as mission-critical. They include but are not limited to:

- ✓ **Customer Service.** Specific behaviors related to courtesy, transaction accuracy, solution orientation, professionalism.
- ✓ **Relationship Sales:** Expanding customer relationships by taking ownership of situations, putting the customer's best interest first, giving good advice relative to product solutions based on the customer's needs profile, following through on requests and referring a customer to a specialist when necessary.
- ✓ **Integrity:** The handling of cash, customer's private financial data and requests.
- ✓ **Retention Issues:** Unsolved problems that would keep a customer from returning or recommend your bank.
- ✓ **Operations and Procedures:** Compliance issues, security, cleanliness, policies.
- ✓ **Visual Cues:** Interior and exterior signage clarity, merchandising effectiveness.

The PerformanceChek program provides you with information to make better decisions that can help you increase sales, reduce customer turnover, increase fee income and profits.

### Business Units We Support

- Personal Banking
- Business Banking
- Trust, Investments, Wealth Management
- Insurance (if applicable)
- Other subsidiary relationships or affiliates as applicable

### Surveys are Custom Created

Customer Experience Experts has expertise in the following research methodologies for banks. Surveys are custom created to ensure support of your bank's standards of performance and Relationship Sales culture.

## The PerformanceChek™ Methodology Package for Banks

### Pieces of the PerformanceChek™ Puzzle

 Web-based (customer and employee surveys)

 Telephone Interviews

 Print, Direct Mail, Direct Response

 TouchPoint™ surveys

- Lobby
- Statement
- Telephone

 Focus Group Research

 Mystery Shopping

- In-person
- Telephone
- Website

 Video/Consumer-intercept Interviewing



**PerformanceChek™**

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## MultiMethodology



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## Actionable Results



**CUSTOMER EXPERIENCE  
EXPERTS**

SET STANDARDS. MERCHANDISE. TRAIN. SURVEY.

A Comprehensive, Customized, Turnkey Solution to Bank-wide Customer Experience Assessments.



### Pieces of the PerformanceChek™ Puzzle

#### Web-based (customer and employee surveys)

PerformanceChek utilizes state-of-the-art web-based surveys to support both current customer satisfaction assessments and/or closed account/lost household data collection. Employees can also be surveyed regarding corporate culture issues, or tested for product knowledge. The applications for Internet-based surveys are almost limitless.



#### Telephone Interviews

Telephone interviewing is conducted by experienced personnel using computer-aided interviewing software. Of course, paper and pencil techniques can also be used!

- **Post-transaction research:**
  - Measures post-transaction customer satisfaction levels
- **Closed account research:**
  - Measures key customer defection issues
- **Current customer satisfaction research**



#### Print, Direct Mail, Direct Response

PerformanceChek uses print and direct mail surveys...

- To measure mission-critical customer experience issues relevant to your banks current culture.
- As a follow-up support piece to telephone interviews when the customer can not be reached after multiple attempts. (Voice mail is left expressing sincere “we care” message from bank management and asking the former customer to watch for a print survey to arrive shortly in the mail.)



#### TouchPoint Surveys (Branch/Lobby, Telephone, Statement Stuffers)

TouchPoint™ Surveys are surveys that are executed at the point and time the customer has chosen to do business with you. They are brief, to the point, and often executed by an employee or bank representatives polite request.

PerformanceChek TouchPoint™ surveys include....

- **TouchPoint Branch Lobby** – A print survey that tellers distribute by politely asking their customers to answer one quick question that is important to bank management and placing their reply in a confidential reply box or pre-paid postage response method. (Sometimes customers who participate are entered into a drawing for \$100 cash, etc.) Results are tabulated by PerformanceChek professionals.
- A variation to TouchPoint Branch surveys this technique positions a representative from PerformanceChek at your location who politely requests random customer’s participation in a brief one-question/one-topic survey. (Often a one dollar bill is given for participation.)
- **TouchPoint Telephone** – This is similar to the above, however the question is asked over the phone by the Branch or Call Center employee who was serving the customer. It may be as simple as asking the question, “Have I provided you with excellent service today?” or, “Have I met or exceeded your needs and expectations today?”

- **TouchPoint Statement** – A simple statement insert that briefly welcomes customer’s to evaluate the bank relative to the bank’s key standards of performance issues. When used consistently over time, a designated number would be placed in statements by random sequencing, structured to be sure to include a sampling from all account types and branches.



### **Focus Group Research**

Focus Group research is used when you want to “drill-down” and dig deeper in to theme issues that surface in all other forms of research methodologies. Focus Group research participants can include customers, prospects, even employees.



### **Mystery Shopping**

PerformanceChek Mystery Shopping measures employee behavior-specific performance and facilities check-ups.

Mystery Shopping as well as other PerformanceChek assessments, creates an awareness on the part of employees that their actions count and can have a serious impact on the growth and success of the business.

### **Why Mystery Shopping**

- Provides reports to management to be used to reward star performers, motivate average employees, and plan training and counseling for employees whose skills need to be improved.
- Helps employees do a better job of creating good, long lasting relationships with satisfied customers.
- Provides data for bank management to use in situations where concrete, quantified, unbiased information would be valuable.
- Trends the data to demonstrate the success of sales and customer service training.
- Monitors consistency of information, product/service knowledge, and an understanding of the bank.

### **Give your managers the information they need to have a winning team.**

Join top performing banks who do more than provide customer service training; they also monitor their offices and employees for customer service excellence.

### **Well-executed shopping programs have been proven to improve performance & results.**

Our branch-shopping program gives you the information you need to reward great performance and coach team members who need encouragement to succeed. We create a customized survey for your bank, based on what is important to you.

# What We Measure

Here are just some of the specific behavioral areas our professional shoppers measure:

- **Greeting: Timeliness and Tone**
  - Prompt greeting/Established interest
  - Smile/Attitudes of employees
- **Customer Feeling of Welcome/Courtesies**
  - Eye contact, tone of voice
  - Calling the customer by name
  - Pleasant conversation/Friendly demeanor
  - Provided undivided attention
  - Excused if any interruptions/waits
- **Accuracy and Dependability**
  - Accurately handle transaction
  - Request identification for non-deposit transactions
- **Relationship Building/Consultative Sales/Personalized Service**
  - Introduce themselves/Shake hands
  - Offering a business card, positioning your representative as a resource for additional financial needs
  - Product knowledge excellence: Presented products with confidence
  - Asking good questions
  - Listening well
  - Offering additional services to compliment identified needs
  - Shaking the customer's hand as an expression of professionalism
  - Thanking the customer for choosing your bank
  - Displayed initiative/Asked for the business without pressure
  - Referrals to product or service specialists when appropriate
  - Follow through on promises
- **Referability**
  - Would refer the bank based on this service experience
  - Would want this employee to wait on them again
  - Overall rating of this service experience in relation to other banks used on a regular basis
- **Facility Tangibles and Compliance**
  - Appearances of employees and their work area
  - Wait times
  - Professionalism
  - Facility clutter
  - Visibility of directional signs and other
  - Important information/Compliance signage requirements
  - Parking/Traffic patterns
  - Dress code adherence

Note: Sample scorecards can be provided.

### **Video Mystery Shopping (Optional: priced at request of client)**

Specially trained video-equipped shoppers have the ability to create and film realistic interpersonal sales and service encounters in your bank, and then provide the critical coaching to fine tune and enhance your team's performance.

Choosing this service will almost guarantee successful results regarding behavioral changes in your staff's selling and customer service methods. This is absolutely the best training tool available on the market today. Standard employee release forms are provided and all applicable state laws are honored.

## **Advanced on-line technology with Customer Experience Experts's SASSIE System™**

### **Shopper Recruitment**

In addition to Customer Experience Experts's personal recruitment and training of shoppers, when needed our online shopper registration allows for extremely rapid recruitment, and can be configured to capture any shopper demographics your bank needs for reporting or screening purposes.

### **Automated Scheduling**

When needed, our autoscheduler is designed to create, advertise, and assign extremely large numbers of shops. Shoppers are pre-screened according to your criteria for each shop (i.e. age, gender). Statistics for each shopper (quality rating, last shop, number of recent shops) are displayed during the assignment phase, allowing Customer Experience Experts to make quality decisions on the best shopper for any given shop.

### **Powerful Survey and Scoring options**

With over 15 question types, text size and color formatting, conditional question logic, I have immense flexibility for creating your forms. Furthermore, Customer Experience Experts allows for sectional scoring, sub-sectional scoring and more. If you require unusual scoring systems on your forms, our custom scoring feature can implement even the most complex scoring logic.

### **Online Survey Collection**

Customer Experience Experts shoppers will be able to fill out their surveys online, allowing data to be entered directly into the database. This provides you with timely actionable feedback.

### **Report Distribution**

Multiple tools can be used for distributing survey results to you. Automated emails can notify managers when a new shop is ready for viewing. Bulk Distribution tools can email every manager a personalized list of instant links to online reports. Finally, Customer Experience Experts's remarkable PDF constructor engine can compile thousands of reports into one PDF "book," allowing you to print a batch of surveys in one pass.



### **Video Interviewing**

This research methodology is often used to test brand awareness or the strength of your positioning,

Video interviews are quick questions asked in person by skilled interviewers. It is a valued technique by clients as they have the opportunity to see and hear spontaneous consumer responses to questions of keen interest. Locations that have been pre-approved for interviewing permission are utilized.

### **CustomMethods**

Customer Experience Experts will customize survey questions, techniques and methodologies to meet your specific needs. Our abilities are not limited to those outlined in this proposal.

# Reports, Analysis, Action

The knowledge and insight gained from PerformanceChek™ customer experience reports will provide you with a SWOT analysis that allows your management team to create effective counter strategies (Action Plans) and determine strategic positioning needed to gain or protect market share.

Data gathered from all methodologies is integrated to provide a unified outline of strengths, weaknesses, opportunities and threats.

The **data can be segmented** by:

- Employee
- Branch
- Region
- Total Bank
- And more

## Reports

**Reports include but are not limited to...**

- Service Excellence Detail and Summary Reports
  - Average service scores by quarter, by location, and for your total organization
  - Branch improvement recommendations provided via detailed comments on each branch score card
  - High performing, and low performing branch reports
- Relationship Sales Detail and Summary Reports
- Behavior Specific and Mission-Critical Reports
- Drill-down, Issue Isolator Reports
- Detailed comments are provided for each “shop” relative to many aspects of the customer experience
- Coach’s Critical Issues Report
- Trend Analysis Reports/Graphs
- CompetitorCompare™ Reports
  - These reports help you answer the question...“Are we performing as well as or better than the competition?”
- Promo/Campaign results reports
  - Custom questions can change periodically, questions that specifically ask if the employee promoted a specific product or service, or properly supported a current campaign strategy.

# Analysis

## Detailed information is important, but trending is critical.

The ultimate value we bring you is our ability to show how the information we have gathered –over time, over employees, over locations, for instance – paints a fact-based picture of what is wrong or right about your customer service experience.

## Questions are weighted, based on their importance to you...

Using Mystery Shopping as an example, questions are weighted or “scored” and can be adjusted to contribute as much or as little to the banks overall customer experience score.

## PerformanceChek reports will...

- Pinpoint specific problem areas
- Identify sales and service opportunities
- Highlight your areas of excellence
- Realize your customer’s value proposition
- Monitor the effectiveness of promotional campaigns
- Structure input for management bonus and reward programs
- Fortify your bank against competitors

In partnership with Customer Experience Experts, PerformanceChek reports will give you the ability to turn data into action plans that lead to correction of problem areas.

# Action Plans

By compiling and analyzing our report data in close partnerships with you, we give you the tools necessary to make changes and set action plans in place for how you interact with customers – changes that can lead directly and immediately to increased customer satisfaction, more repeat business and better long-term profitability.

**“Great teams pride themselves on being able to unite behind decisions and commit to clear courses of action.”**

**– Patrick Lencioni, The Five Dysfunctions of a Team**

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# Sample Surveys

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Here are just a few samples of surveys Customer Experience Experts conducts for PerformanceChek clients.

**IMPORTANT REQUEST  
FOR INFORMATION**

Our bank  
President would  
like your response  
to these questions...

**Closed Account survey:** This survey can be conducted in print, by telephone interview or Internet survey. It is conducted to let the customer know you are sorry they closed their account, and that you are genuinely interested to know how you could have served them better.

**Client Satisfaction Survey for Trust and Investment Services and Business/Commercial Banking Clients:** This survey can be made available to Investment Services or Business Clients in two formats: On-line or Print/Direct Mail. We make it available in two formats as we have found that a significant number of Trust and Investment Services clients still prefer “paper and pencil.” Survey content is always customized to your bank’s sales and service standards of performance, and is representative of your bank’s brand personality.

We like to be sure  
we are offering  
our clients  
uncommon service  
and solutions.

Please rate us  
on how we are  
doing for you...

**Mystery Shopping Scorecards:** Sample scorecards can be provided for your review. Questions asked on mystery shopping scorecards support your need for feedback relative to very specific behaviors that are important to your organization. Advanced on-line technology enables timely reporting on these key behaviors.

Customer Experience Experts has surveys that support a wide range of PerformanceChek, customer satisfaction objectives. We would love the opportunity to discuss them further and customize them for you.

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## Request An On-Line Demo

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Contact Nancy Draude at 717-371-5310.

## Support Services



### BrandChek™

Branding your PerformanceChek standards by integrating them into your bank practices and culture.

Create an “internal campaign” to get your employees excited!

Once your standards (or code of conduct) and Relationship Sales strategies have been finalized, you’ll want to be sure to present them in a very visible way that reflects your brand personality.

Develop an upbeat theme for your revived bank philosophy and promote it to your employees by providing them with a laminated copy of your “standards.” Wallet cards, paperweights or other items keep the program positive and visible while reinforcing your brand commitment. We can incorporate your standards into everything from employee newsletters to performance agreements.

Formalizing the program by integrating your brand standards in to multiple employee and customer touch-points lets your team know this is not a 60-day program but rather a long-term commitment.



### CoachChek™

Training and measurement support services specifically geared toward managers that coach and confront others with PerformanceChek issues. CoachChek provides your Branch Managers with Leadership Effectiveness Training (L.E.T.)

- L.E.T. provides “How To” tools for supervisors.
- A special program designed to help leaders enhance their current skills in an effort to build high performing teams. It primarily addresses how to confront employees with performance problems in a way that maintains a good working relationship going forward. Emphasis is placed on the value of each individual team player.

#### **Why is this important?**

- Leaders get promoted into positions that require them to work closely with others.
- Too often, they are not provided with specific training which can make this role difficult and draining.

#### **L.E.T teaches techniques supervisors can use for the benefit of everyone!**

Research clearly shows...

“The effective leader must be both a “human relations specialist” and a “task specialist”

#### **In L.E.T. leaders learn how to...**

- Solve problems effectively
- Practice “active listening”
- Use a non-threatening, non-power approach to encourage better performance

#### **Leaders also learn how to...**

- Resolve conflicts so neither person loses and each person gets their needs met
- Recognize and avoid the “roadblocks” in person-to-person communication

#### **The following are outcomes of L.E.T.**

- Improved job satisfaction
- Increased contributions by employees of new ideas
- Enhanced job competencies and skills
- Increased productivity

Note: If of interest, please request a complimentary copy of the text and highlights from the session workbook. A Supervisory Skills Assessment Survey is also available as a support piece to CoachChek™.



## **RewardChek™**

Reward and recognition is letting your people know privately and publicly, and in ways that are meaningful to them, when they have done a good job...a job that is specifically correlated to the bank's Relationship Sales strategy and overall corporate financial goals.

### **RewardChek can help you...**

- Coordinate an ongoing program for rewarding and recognizing your team players.
- Create a theme, outline the program and supply you with any support pieces necessary to run with your program.
- Provide you with trophies and plaques that keep your reward program visible and are custom designed to represent your brand.

### **To evaluate my banks need for RewardChek support services, how would you answer the following questions for your bank?**

- We fully value everyone's talents.
- When employees perform, we reward and recognize them in ways that are meaningful to them.
- We know what is the most important perk to each employee and, when possible, we pay attention to their preferences.
- We have rewards in place for both individual and team performance.
- We recognize performance that specifically correlates back to the banks corporate financial goals.
- We celebrate success.



## **MerchandisingChek**

MerchandisingChek enables you to create professional sales and service environments to compliment a Relationship Sales culture.

Customer Experience Experts has a complete line of visual marketing products that will bring life to your "sales floor." Don't miss valuable sales opportunities with boring queue lines, cluttered customer service areas and blank walls. Deliver your message while you have your customer's attention.

### **Customer Experience Experts can help you with...**

- **Promotional signage displays**
- **Directional signs**
- **Compliance/Regulatory Signs**

**Specializing in bank signage needs our product line includes:**

**Teller Information Systems**

- Includes teller name, member FDIC, funds availability policy, courtesy ID, bank logo, and any customer message that is important to your organization.

**Customer Service Desk Information Systems**

- Includes CSR/MGR or Loan Officer's name, Patriot Act, Business card holder, ChexSystems logo, and other important disclosure information.

**Complete your merchandising with...**

- Lobby Poster Frames in single, double or triple framing units
- Kiosk Displays, customizable with interest rates, poster(s) and brochure pockets
- Showcase Units featuring space for an 8.5 x 11 poster and "take-one" pocket(s)
- Drive-up and ATM machine signage/weather-proof frames
- Regulatory Sign Systems, sectioned for your convenience as compliance needs change
- Safe Deposit Box signs
- Departmental and directional signs
- Welcome and other special message signs including your tagline or mission statement

**Bank Branch Site Survey...an added service for busy clients**

We will do a site survey of your offices and make recommendations to help you maximize your current branch merchandising opportunities and clean up the clutter.