

Mystery Shopping

WHY DO MYSTERY SHOPPING?

Monitor and measure service performance

Improve service quality, customer satisfaction and retention

Identify best practices to be adopted across the bank

Ensure product/service delivery quality

Get feedback from front line operations

Monitor facility conditions

FACT: 30-70% of customers who leave their bank each year, cite "poor service" as the primary reason

FACT: A 5% increase in customer satisfaction delivers a 25% to 125% growth in profit

FACT: Businesses conducting mystery-shopping programs grew an average of 11.1%

Do your employees create positive, memorable experiences for your customers? Here's how to help them leave a lasting impression that will attract and strengthen new and existing customer relationships.

Mystery Shopping from Pinnacle provides:

- Customized, behavior-specific surveys and scenarios tailored to your unique requirements, training goals and organizational objectives.
- A variety of data-capture tools, from onsite evaluations and telephone surveys to marketing campaign audits and customer satisfaction interviews.
- Online access to findings via a secure, password-protected system available around the clock.
- Management-ready reports and analysis at any level of detail you desire.
- Consultative support from former bankers focused on you and your institution.
- Start-to-finish assistance in implementation and program development.
- Unsurpassed quality assurance and quick turnaround.
- Results that exceed your expectations.

Programs start as low as \$5,000

Depending on your market, geography and budget, a combination of customer satisfaction studies and telephone shops may be your most economical option.
Talk to us about developing a customized program for your institution.

Research proves that when you exceed customer expectations, you expand customer relationships.

- Identify, track and trend behaviors that make a difference in your institution's overall performance. We customize programs to fit your needs, objectives *and* your budget.
- The detailed responses supplied by a shopper encounter provide your management team direct insight into areas that warrant re-training while also highlighting your outstanding performers.
- A performance measurement program geared toward positive reinforcement aids staff development efforts. When properly presented, employees see mystery shopping as an opportunity to demonstrate their sales and service abilities.
- Ongoing assessment helps identify opportunities for motivating and educating a successful, service-focused and sales-oriented team
- Interview type, shop types and frequency can vary by location, allowing you to target branch locations and regions that require more attention and to focus your budget dollars accordingly.
- Management-ready reports provide analysis of your results at any level of detail you require and our web-based reporting system allows for direct access and distribution.

Demo our Mystery Shopping Reporting System online at pinnstrat.com.

Methodologies

Telephone Shopping

A cost-effective, true-to-life evaluation of your service levels. Calls can be directed to your platform, lenders and/or call center.

Face-to-Face Shopping

A systematic and verifiable solution for monitoring the effectiveness of your employees' face-to-face sales and service levels.

Internet Shopping

Make sure your customers are receiving the same level of service online or within your branch.

Competition Studies

Leverage your position in the market with an apples-to-apples comparison that tells you what differentiates you from your competition.

The Pinnacle Difference

- ✓ Expertise in the Financial Industry
- ✓ Custom Designed Surveys
- ✓ Account Executives
- ✓ Actionable Data
- ✓ Web-Based Reporting
- ✓ Consulting/Continual Program Evaluation
- ✓ Commitment to Quality

Contact Us Today.

Call us at 800.741.7758 or email info@pinnstrat.com for more information.

Pinnacle Financial Strategies is the nation's leading provider of programs that generate revenue and improve bottom-line profitability for community banks and credit unions. Pinnacle's innovative cash reward programs, best-in-class overdraft privilege programs and industry-leading mystery shopping services position clients to grow market share and increase profitability. For more information, visit pinnstrat.com or call 866.737.1235.

