

Voice of the Customer

Customer Satisfaction Studies

WHAT WILL YOUR CUSTOMERS SAY?

Do you feel that employees know who you are and call you by name?

Is this your primary bank?

Do you plan to use online banking?

Would you recommend us to others?

If you could talk to our CEO, what would you say?

Customer satisfaction studies help you identify the strengths and weaknesses in your customer interactions, which in turn helps you improve the customer experience, increase retention and build long and loyal relationships.

Measure a specific event or transaction ... or get the "pulse" of your customer base.

Based on your business objectives, we reach out to your customers to gauge their perception of their experience with you. Our survey questions are designed to measure their satisfaction and identify opportunities for improvement. Find out what attracts customers to your institution ... what keeps them coming back ... which customers you are at risk of losing (and why) ... how they feel about the institution, its branches and its representatives ... and whether or not your employees are living up to your service standards.

Pinnacle's "Voice of the Customer" Satisfaction Studies include:

■ ACCOUNT OPEN SURVEYS

Find out why prospects become customers. Hear about the first moments of their relationship with you. Learn how to strengthen the initial bond.

■ ACCOUNT CLOSED SURVEYS

Find out why your customers discontinue their banking relationship with you. Learn how to intervene before they leave, correct the causes and reduce your attrition rate.

■ CUSTOMER SATISFACTION SURVEYS

Measure influencing factors such as employee knowledge, friendliness and responsiveness ... convenience of branches or hours of service ... likelihood to recommend you...and more.

■ POST-TRANSACTION SURVEYS

Episodic studies can help to refine service levels and/or identify potential product cross-sell opportunities with existing customers.

■ MORTGAGE/HOME EQUITY CLOSED LOAN AND NON-CONVERTED APPLICANT SURVEYS

Interview consumers who have and have not become customers for specific products to identify factors that can substantially improve your conversion rates.

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.

Pinnacle's "Voice of the Customer" Studies are designed to be an integral component of your sales and service measurement program:

- Each study is customized to address the unique needs of each institution
- Competitively-priced and cost-effective, tailored to align with your budget parameters
- All surveys conducted by phone, typically no longer than 3-4 minutes
- Prompt, web-based reporting allows for immediate access and action
- A broad cross-section of respondents ensures highly credible data
- An independent third party survey ensures that opinions and/or complaints are recorded and reported without bias.
- Survey questions can be targeted to meet specific operational needs
- In-house capability to handle small or large survey programs
- Survey data can provide useful marketing feedback for new promotional items and concept modifications
- Track long-term data to develop corporate norms, benchmarks, reviews and employee incentive systems

Methodologies

Person-to-Person

Our professional callers make in-person connections with your customers to gather survey responses and reactions.

Interactive Voice Response (IVR)

A cost-effective method to collect data from a large number of customers. Customers call a dedicated toll-free number and answer questions with their telephone keypad. Record verbal comments and answers to open-ended questions. Program in multiple languages; offer incentives for response, and more.

Interactive Computer Response (ICR)

An even more cost-effective way to extend the reach of your research, enabling customers to complete your survey online.

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.

