

AS NEW TECHNOLOGIES, HEIGHTENED REGULATION AND GENERATIONAL SHIFTS CONTINUE TO TRANSFORM THE FINANCIAL INDUSTRY, KEEPING YOUR FINGER ON THE PULSE OF CONSUMER NEEDS BECOMES EVEN MORE CRITICAL THAN EVER BEFORE.

Drive Optimal Performance Through Powerful Knowledge and Insight

Scantron Survey Services, a part of the Harland Clarke family, helps financial institutions uncover valuable insights from survey research that can drive bottom line results:

- *Understanding the key drivers of satisfaction, loyalty and advocacy among account holders on factors including:*
 - Overall performance
 - Account holder relationship
 - Service attributes
 - New and closed account process
 - Primary financial institution
 - Product/service design and enhancements
 - Branch and facilities
 - Innovation
- *Identifying new revenue and growth opportunities*
- *Attracting and growing new account holder relationships*
- *Turning marginally profitable account holders into profitable ones*
- *Making better-informed business decisions*

Scantron offers a full range of survey services—from design and development to data collection and analysis—allowing decision-makers to focus and take action more quickly on accurate and insightful data. Our financial services industry experience allows us to understand and meet your survey research needs based on your specific objectives. We offer a variety of survey applications, as well as data collection for compliance requirements.

From full-service survey research to an à la carte or modular service approach—our solutions are customized to your needs.



Survey Research Reveals Opportunities to Maximize Organizational Improvement

Survey research of your account holders and employees provides insights and deeper understanding of engagement, loyalty and advocacy:

- *Account holder satisfaction & loyalty surveys*
- *Employee satisfaction & loyalty surveys*
- *360-degree feedback surveys*
- *Compliance-related data collection*
- *Online proprietary customer panels*
- *Market research*
- *Focus groups*
- *Management debriefs & action planning*

A Provider You Can Trust

Scantron Survey Services brings nearly 40 years of experience, partnering with many of the largest financial institutions, to provide the critical information required for informed business decisions.

Gain the insight needed to improve organizational performance through:

- *Developing customized surveys, data collection forms and services based on defined requirements*
- *Using existing account holder or employee database information to provide additional segmentation of survey data*
- *Combining administration methodologies to reduce costs and increase response rates—paper, web, phone, or a hybrid*
- *Disseminating detailed data reports with Key Driver indicators, benchmark comparisons and trend analyses*
- *Engaging our expert team of loyalty and engagement Ph.D. and consultant staff to help improve account holder satisfaction, loyalty and advocacy*
- *Including optional additional consultative services to develop action plans that lead to positive business results*
- *Providing a dedicated, professional project manager to each survey research or data collection project who becomes both an extension of your team and your central point of contact throughout your project*

Our goal is to create long-term relationships built on trust with our clients. We succeed only when our clients succeed.

OUR SERVICES INCLUDE:

Pre & Post Survey Consulting

Personalized consulting services for survey research design, planning and results implementation.

- *Needs Analysis*
- *Survey Plan*
- *Survey Refinement*
- *Written Interpretive Reports*
- *Key Driver Analysis*
- *Presentation of Results*
- *Action Planning*

Emphasis on customer and employee satisfaction, engagement and loyalty and how it relates to advocacy at all touch points of the customer experience.

Deployment & Data Collection Methodologies

Multi-Modal data collection abilities—paper, web, phone, or a hybrid.

- *Paper: OMR, ICR, OCR*
- *Web: Email, Web & QR Code*
- *Phone: Inbound & Outbound*
- *Focus Groups*

Data Reports and Analysis

Data analysis and interpretive reporting that identify the Key Drivers promoting customer and employee loyalty.

Professional Project Management

Dedicated and experienced project managers guide you through the intricacies of your survey research or data collection project.



FOR MORE INFORMATION ON HOW SCANTRON SURVEY SERVICES' SOLUTIONS CAN BENEFIT YOUR ORGANIZATION, CALL US AT 800-722-6876, EXT. 7791 OR VISIT WWW.SCANTRON.COM/SURVEYSOLUTIONS/FULLSERVICE.