

Scantron Customer Loyalty Series

Understanding the Customer Experience

SCANTRON®

THE SCANTRON CUSTOMER LOYALTY SERIES IS A SURVEY SOLUTION DESIGNED SPECIFICALLY TO HELP FINANCIAL INSTITUTIONS IMPROVE CUSTOMER LOYALTY.

Customer Loyalty

Measuring customer loyalty goes beyond an annual customer satisfaction survey. At Scantron, we've developed a comprehensive approach to measuring customer loyalty at all touch points to provide an accurate view of customer satisfaction.

Knowing more about customer loyalty can help your financial institution meet its overall goals and objectives by:

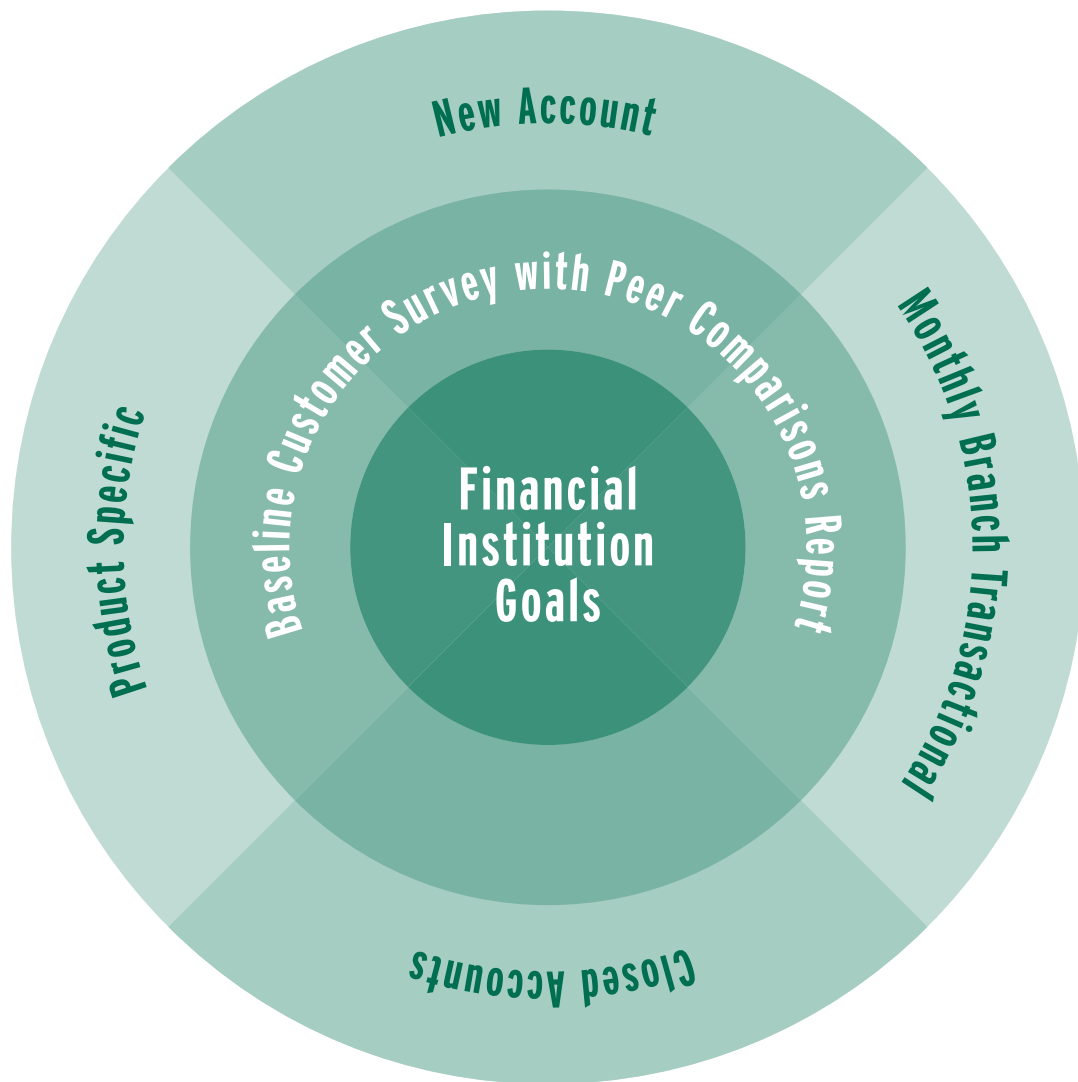
- Determining factors that enhance the ability to retain customers
- Growing the number of account relationships
- Gaining a larger share of wallet for each product type

Customer Loyalty Series

The core of the system is the **Baseline Customer Survey with Peer Comparisons Report**. The Baseline Customer Survey creates an overview of how a financial institution is perceived by its customers. Any one or combination of the following **Survey and Report packages** can complement this central component:

- New Account
- Closed Account
- Monthly Branch Transactional
- Product-Specific





Scantron Baseline Customer Survey and Customer Loyalty Index

The Scantron Customer Loyalty Series is our approach to measuring the customer experience. The standard Scantron Baseline Customer Survey (which can be done monthly, quarterly or annually) provides an account of existing customers, utilizing a loyalty reporting package and descriptive executive summary.

The Scantron Baseline Customer Survey establishes a Customer Loyalty Index, which may be tracked over time to monitor performance and measure progress.

Peer Comparisons Report

Scantron provides comparisons of your results to those of your peers, so you know where you stand with your customers. You will gain a clear picture of those areas in which you fare better or worse than other financial institutions.

“The Scantron Baseline Customer Survey creates a snapshot of how your financial institution is perceived by its customers. The survey is the starting point to determine what needs to be fixed and opportunities for growth.”

Additional Customer Satisfaction Surveys in the Scantron Customer Loyalty Series

Built on baseline loyalty survey questions, these additional surveys provide a more complete look at the customer base from different vantage points across the customer experience. These surveys provide a more concentrated focus in order to:

- Acquire more accounts and customers
- Retain current accounts
- Maintain and develop relationships and products to maximize accounts
- Grow the existing customer relationship by moving to more efficient delivery channels and offering satisfying services and products



Product-Specific Survey

Used to establish which product features and benefits will result in a higher response rate to promotional campaigns, the information provided in this report will improve the financial institution's target marketing. Specific products include, but are not limited to: Mortgage, Equity, Small Business and Loans.

Monthly Branch Transactional Survey

Branch management will learn what steps can be taken to improve customer satisfaction and determine if staff may benefit from specific areas of training. Additionally, ideal hours of operation and information on the product offering will be uncovered. The financial institution can also use the study to better place new facilities.

Successful implementation of the Monthly Branch Transactional Survey will lead to more efficient utilization of resources, enhanced customer satisfaction, a better understanding of service requirements and site location preferences.

Closed Account Survey

Value will come from identifying the controllable (decision to close account may be impacted by changes at FI) and uncontrollable (relocation, death, etc.) reasons customers close an account or end their customer relationship. ROI will be enhanced by reduced lost account revenue and reduced marketing expenses to replace lost customers.

New Account Survey

Develop knowledge of product features and marketing messages that help attract new customers. ROI improvement for this survey comes from the more efficient use of marketing resources for acquiring new customers.



The Scantron Customer Loyalty Series will help your financial institution identify potential problem areas, as well as areas of opportunity for improvements. It will provide feedback on product enhancements and specific service requirements. Knowing how your customers feel about services offered and services desired is a key factor in developing and tracking customer loyalty. Understanding your customers is the key to reaching your goals.

Measures of customer relationships need to contribute knowledge that will help achieve these important goals:

- Monitor overall customer loyalty to the institution
- Identify needs for specific service or product enhancements
- Compare performance across departments or branches
- Identify areas of improvement which will increase customer loyalty
- Reduce problems which are expensive to fix

Implementing successful baseline surveys will alert management to:

- Changes that reduce account turnover
- An increase in cross-selling success rates
- Identify 'best practices' branches to emulate and benchmark customer satisfaction for future trends analysis



For more information, visit us at www.scantron.com or contact your Scantron representative at 800-722-6876 or email info@scantron.com.

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