

STRATEGIC PLANNING & POSITIONING



Image & Awareness Studies

Determine your brand recognition and perception in the marketplace. Gauge your competitive positioning in the community.



New Product Feasibility Studies

Before implementing a product or service, project market demand by gathering customer opinions through surveys or focus groups.



Location Analysis

Assess real estate locations to optimize customer appeal for branch locations or ATMs.



Market Segmentation

Identify niche market opportunities to build loyalty.



Employee Surveys

Learn perceptions, identify needs, measure satisfaction related to employees' work environment.



Marketing Audit

Evaluate current marketing activities by benchmarking them to help determine their effectiveness.



Trend Analysis

Highlight banking and finance industry trends. Identify opportunities to build on marketplace needs.



Competitive Assessment

Profile top competitors in your marketplace. Identify saturation and competition. Estimate market share potential.

GAUGE YOUR CUSTOMERS' SATISFACTION



Customer Satisfaction/ Needs Assessment Surveys

- › Measure member satisfaction and loyalty
- › Obtain a better understanding of your clients' needs

Closed Account Surveys

- › Understand why your customer voluntarily closed an account
- › Learn where their banking needs are being met and how to recover and retain customers

Mystery Shopping

- › Evaluate members' experience when opening a new account, securing a loan or utilizing services
- › Conduct on-site or telephone mystery shopping

Focus Groups

- › Utilize qualitative group discussion formats to understand opinions and interest in program and service enhancements