

# CREDIT UNIONS & FINANCIAL SERVICES

## 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