

CREDIT UNIONS & FINANCIAL SERVICES



STRATEGIC PLANNING & POSITIONING



Brand Image & Awareness Studies

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



Employee Surveys

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



Location Analysis

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



Competitive Assessment

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



New Product or Service Feasibility Studies

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



Trend Analysis

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



Market Analysis & Assessment

Learn how to best position your services in new markets or better understand niche segments of your existing or potential clients.

GAUGE YOUR MEMBERS' SATISFACTION



Member Satisfaction/ Needs Assessment Surveys

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

Closed Account Surveys

- › Understand why your member 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 a skilled RMS moderator to guide a group discussion to best understand your members' opinions, interest in programs, or ways to enhance the client experience.