

# 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.



### Net Promoter Score

Measure how likely your members are to recommend your credit union and understand your ranking with benchmarking.

## 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.

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