



AllianceLink® Financial

Drive Profitability by Managing the Customer Experience

In today's competitive financial industry, simply measuring customer satisfaction is no longer enough. Advancements in technology and digital automation are rapidly changing how financial institutions engage customers. As digital banking becomes the norm, financial institutions face intense competition among a customer base with diverse expectations and preferences.



Understanding the Customer Experience

The AllianceLink® Financial solution is a comprehensive, multi-channel employee and customer engagement solution that takes Customer Experience Management from theory to practice. Through a series of research-based surveys, financial institutions can measure, monitor, and improve customer and employee experiences, leading to long-term profitable growth for the company.

AllianceLink Financial goes beyond traditional surveys to improve the overall customer experience in your financial institution by providing:

- Ongoing measurement of the customer experience including customer and employee satisfaction, loyalty, and advocacy
- Trending analysis for tracking performance over time
- Specific product or service enhancements
- Increase in cross-selling success rates
- Problem resolution to increase employee and customer retention
- Account holder profiles to identify differences in financial goals, banking preferences, and service expectations by demographic group
- Comparison of performance across other industry benchmarks, branches, or departments to emulate "best practices"

AllianceLink Financial is the Answer

Based on 40 years of survey research experience, our survey program collects valuable employee and customer feedback across multiple touchpoints within your organization. When financial institutions implement the Employee Engagement, Customer Experience, and Customer Engagement Surveys, they obtain a comprehensive view of their organization.

This critical insight is disseminated to the people who can directly impact the customer experience—from front line employees to top executives.

AllianceLink Financial can help your financial institution meet its overall goals and objectives by:

- Identifying new revenue and growth opportunities
- Growing the number of account relationships
- Gaining a larger share of wallet

AllianceLink Financial includes surveys to measure loyalty and performance at specific touch points.

Employee Engagement Survey

To engage your customers, you must engage your employees. Highly engaged employees directly impact customer relationships and ultimately the bottom line. The Employee Engagement Survey is a highly refined 15-item instrument that measures employee attitudes toward their work, team,

"It has been a good partnership because wherever there are gaps, Scantron notices and alerts us. I can trust that someone is looking at my data to ensure that there's a check and balance."

Ashley Smith, Chief Marketing Officer, NavyArmy Community Credit Union

supervisor, and the organization as a whole. Financial institutions gain insight into what areas matter most to employees and how these impact employee retention, productivity, and service to customers.

Customer Engagement Survey

Customer engagement describes the overall perceptions that customers have toward the organization following just one interaction or several interactions. Highly engaged customers are satisfied, loyal, and emotionally committed, and will actively promote your company to others.

The Customer Engagement Survey is a research-based tool that measures how your financial institution is currently performing according to your account holders. The survey includes questions related to the staff, ease of accessing accounts, products and services, account holder relationships, and more.

The results are provided in a comprehensive report with industry benchmarks and account holder profiles which may be tracked over time to monitor performance and measure progress. This information is vital to understanding where your customers are today, improving the overall customer experience, and driving advocacy levels to facilitate growth.

Customer Experience Surveys

These surveys address the customer experience from specific transactional touch points. Each survey measures unique attributes relating to the transaction across both physical and digital channels.

Are your onboarding strategies promoting long-term memberships? The Onboarding Experience Survey measures the customer experience of opening a new

account/loan, in-person, and online. Gaining new account holders requires a positive first impression, an easy application process, and high quality service.

What are the customers' experiences at the branch? The Branch Experience Survey addresses the customer experience at the branch. Despite a growing use of digital banking options, the service provided at the branch remains highly important to customers. This survey helps financial institutions both improve the service provided by representatives and reduce customer complaints.

What are the customers' experiences over the phone? The Call Center Experience Survey addresses the customer experience when interacting with the representatives over the phone. This survey helps financial institutions improve problem resolution, reduce the number of service complaints, and enhance customer service performance.

What are your customers' experiences online or through the mobile banking app? The Digital Banking Survey addresses the customer experience through digital banking channels, including the website and mobile app. The focus of the survey is to help integrate physical and digital channels seamlessly to meet customers' "anytime, anywhere" demands.

What are the primary reasons customers close accounts? The Attrition Survey addresses the reasons why customers are closing accounts. This survey helps financial institutions improve problem resolution, enhance customer service performance, and improve customer loyalty.

How do you ensure products and services add value to the customer? The Product Interest Survey is customized based on your needs. The survey collects information related to specific and specialized delivery channels, products, and services.



Survey areas may include but are not limited to:

- New or modified products/services to replace lost fee income
- Customized checking or add-on services
- Retirement/asset management
- Innovations such as mobile banking and social media
- Security suites
- Loan programs



The result? A complete view of your financial institution

AllianceLink Financial includes a variety of reporting options that help you make better business decisions and create data-driven action plans. Based on your needs, the survey results can be summarized through the following deliverables:

- Detailed Data Reports provide the responses to every survey question overall by subgroup, or by period
- Comment Reports include responses to open-ended questions with coding options for easier reporting or more advanced analytics
- Industry Benchmarks allow you to see how you compare to similar financial institutions
- Interpretive Reports provide a written summary of the survey results based on the interpretive statistical analysis

AllianceLink Financial includes the following features in the report:

- Engagement Index enables you to see a “snapshot” view of performance according to customers, track performance over time, and see the impact of business decisions
- Account Holder Profiles identify trends in banking preferences, service expectations, and satisfaction levels by different customer segments
- Survey Debrief provides an online or onsite presentation of the results

Developing the Best Solution

Whether you have a current survey program in place today or are just beginning to explore customer and employee feedback, the AllianceLink Financial solution is the research-based tool that will help your financial organization reach its goals.

Our solution allows you to:

- Apply a comprehensive, multichannel approach that improves both employee and customer experiences
 - Choose the level of service based on your needs, from full-service to à la carte
 - Integrate existing MCIF/CRM information to provide additional segmentation of survey data
 - Customize survey deployment based on your timeline, budget, and survey goals—paper, telephone, online, or a hybrid approach
- Track responses to the Customer Experience Surveys in real-time
 - Understand the results through a variety of reports; from question-level responses to a written summary with key highlights
 - Evaluate responses by job position, branch, region, or other cohort
 - Compare results to industry benchmarks, track performance over time, and measure the impact of business decisions using the AllianceLink Financial Engagement Index
 - Identify differences by customer segments and track satisfaction scores using the AllianceLink Financial Account Holder Profiles
 - Gain further insight and incorporate the results into action plans using our consultative services



CAPTURE INSIGHTS TO MAKE BETTER DECISIONS TODAY!

For a free consultation to meet your research goals, call **800.722.6876** or visit us at **www.scantron.com** to learn more.

About Us

Scantron® provides solutions to help you collect data you can use. We deliver the quality you expect from decades of experience. Whatever your survey or research needs, Scantron can meet you where you are and help you get to where you want to be.