

# Direct Feedback Informs Frontline Skills

This multi-billion dollar financial institution was looking for a way to differentiate, to stand out from the crowd. While successful in Return on Assets, Member Growth and Asset Expansion, they recognized that they needed to:

- Improve frontline service delivery
- Elevate employee accountability
- Better understand member needs and expectations
- Live their brand promise every day

## The Goal

**Delivering great member service and value** is critical to this credit union's success. They wanted to be able to authentically and precisely capture the Voice of the Member, then use this intelligence to identify areas of success while pinpointing opportunities for improvement across the organization. They were looking for a partner who could expertly guide them and support them in their journey to **build relationships for life**.



## The Challenge

While this financial institution knew what they wanted to achieve, they did not have the skills, tools, processes or analytics in place to reach their desired state. Infrequent, inconsistent and unorganized feedback resulted in the delivery of an unpredictable frontline experience.

## The Solution

This credit union has utilized **Relationship Builder** over the years, a sophisticated, Voice-of-the-Member mystery shopping solution, to target their specific service and sales behaviors and inform managerial coaching. Through direct member feedback, groups across this organization – the Digital Channels team, Call Center management, Branch Managers and Frontline employees – have enhanced their service and sales behaviors with an emphasis on delivering an unparalleled service experience. Ongoing granular analysis of employee, team, and organizational feedback encourages accountability at all levels.

## Proven Results

The outcomes far exceed expectations, and the financial institution could not be more thrilled with the transformation. These results include...

- **Forbes Best-in-State Winner** for Member Experience, **both years** of the survey
- Recognized as the **"Go-To"** Credit Union in their market
- Since implementing Support EXP solutions:
  - **300%** Asset Growth
  - **10%** CAGR in Member Growth
- Consistently **leading their peer group** in key financial metrics
- A clear-cut surge in employee **development** and **accountability**

***"Support EXP has been a key partner in our success and we value our partnership!" –Credit Union CEO***