

RELATIONSHIP OPPORTUNITY ASSESSMENT



KEY PROGRAM OBJECTIVES

The Relationship Opportunity Assessment is a 90-Day Mystery Shopping Program designed to meet three important objectives.

- 1. Provide a standardized measurement of customer experiences with bank staff during new account inquiries.**
- 2. Assess the customer service and relationship building skills utilized by bank employees during telephone contacts.**
- 3. Provide baseline performance measurements to identify relationship building and staff development opportunities.**

PROGRAM ADMINISTRATION

Relationship Opportunity Assessment (ROA) programs are administered using evaluations conducted by non-customers trained and managed by Cross Financial.

All evaluations include a standardized assessment that focuses on customer service and relationship-building activities, related to your products and services, up to the point of purchase.

If your organization is focused on deposit acquisition, the ROA evaluations can be directed to deposit accounts, providing assessments of customer experiences in a targeted product area.

SHOPPING VOLUMES BY LOCATION

The standard ROA program includes completion of nine new account evaluations, per branch, during a predetermined 90-day evaluation period. The evaluations are distributed throughout the 90-day period to provide the best assessment of average customer interactions.

PROGRAM SET-UP AND ADMINISTRATION

Program set-up easy. Simply select the branches or departments you would like to evaluate and Cross Financial will do the rest. The ROA program reports will present performance ratings that allow you to compare results between branches, departments and the overall company.

“Making customer evangelists is about creating experiences worth talking about.”

VALERIE MALTONI



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