

Customer Experience Management

Stage One

Employee Survey

Customer Satisfaction Survey

Paper and/or online

Segments: retail, business and online customers

New Account Surveys

Comment Cards

Mystery Customer Program

Sales and service skills

In-person, telephone and online

Staff Development Training

Coaching and management

Service skills

Relationship building

On-Boarding Programs

Retail

Business

Stage Two

Image and Positioning Survey

Retail and business customers

Perceptual mapping of service and relationship attributes

Focus Groups

Selection by product usage and/or market segments

Post-Transaction Surveys

Relationship Matrix Mail Programs

Stage One: Retention

Stage Two: Expansion (cross-selling)

Closed Account Surveys

Employee Online Suggestion Box

System to collect and manage improvement ideas

Transaction Accuracy Assessments

Quality markers identified by management, i.e., teller
balancing records

Stage Three

Observational Coaching

Coaches training

Assessment worksheets and performance scorecards

Employees

Branches, departments, work areas

Operations and Support Management Reporting

Error and problem resolution tracking

Internal efficiency ratios

Customer Advisory Panels

Employee Advisory Groups

Cross Financial Group is a highly specialized consulting firm providing professional marketing services to support financial institution relationship building and corporate communications.

- Business Planning
- Marketing Planning
- Product Assessments
- Market Demographic Analysis
- Competitive Advantage Assessments
- Management Surveys
- Director Surveys
- Employee Surveys
- Brand Management
- Advertising
- Newsletters
- Sales Literature
- Product Brochures
- Corporate Communications
- Direct Marketing
- Staff Development
- Staff Motivation Presentations
- Referral Programs
- Sales and Service Training
- Coaching and Supervision Training
- Customer Satisfaction Surveys
- Online Surveys
- Focus Groups
- Mystery Shopping Programs
- Market Research