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**What Gets Measured – Gets Improved**

# Who is Support Financial Resources?

Support Financial Resources is a financial institution exclusive market research company that provides a variety of measurement and coaching programs from front-line to back-office measuring across multiple delivery channels. We offer comprehensive measurement and coaching systems from Mystery Shopping to Employee Engagement. Top-notch, turn-key products and services to make you better at what you do. That is our mission.

Founded in 1997, Support Financial Resources has been and remains a pioneer and a leader in the development and measurement of service and sales behaviors, providing coaching tools and professional coaching and training to managers and top executives at leading financial institutions nationwide and abroad.

- Founded in 1997 with our only focus being the Financial Services Community
- Over 200,000 service experiences measured in the live environment
- Headquartered in Dayton, Ohio
- Footprint includes coast-to-coast in Continental US, Germany, Belgium, The Netherlands, Puerto Rico, US Virgin Islands and British Virgin Islands
- Companion Company to Support Insurance Systems founded in 1987.
- Member of the American Society for Quality
- Fully committed to being on mission with our clients to make them better at what they do – and we do!

## Our Mission

To Be On Mission With Our Clients To Make Them Better At What They Do - *and we do!*

# Services Experiences™

Service & Sales Mystery Shopping & Coaching Program

## Building Customer Loyalty Has Never Been Easier!

### What is Service Experiences™?

Service Experiences™ is a Mystery Shopping and Performance Coaching Program utilizes the voice-of-the-customer so that you get **Real** feedback from **Real** customers in **Real** time. We evaluate both service and sales behaviors through various delivery channels to identify developmental needs of employees and provide the coaching tools necessary to coach and improve.

Service Experiences™ is a measurement and coaching program intense on effecting change and intense on accountability of front-line employees and their managers.

### With Service Experiences™ you will receive the following:

- Turnkey solution intense on bringing about real change
- Actionable, web-based performance data from the real environment
- Focused accountability at the branch manager level

### The Branch Manager Learns to:

Lead, Coach, and Manage the Process

- Effective Individual and Group Coaching Tools
- Practice Sessions for Individual and Group Coaching
- Accountability and Tracking of Branch Manager's Success

### The Tools of the Program

- Analysis Tools: **Performance Summaries**
- Coaching Tools: **Individual Level**
- Coaching Tools: **Group Level**
- Key Performance Factors
  - How you compare to the competition
- Key Loyalty Factors
  - Are customers emotionally connected?
  - Would they refer you to others?
  - Would they repurchase from you?
- Trend Analysis: **Monthly and Quarterly**

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# You Really Count™

## Lead Generation & Transaction Survey Program

### Communicating Value Has Never Been More Profitable!

#### What is You Really Count™?

You Really Count!™ is a transaction based survey program that reveals customer satisfaction levels and uncovers financial needs that you don't know about.

In addition, YRC™ will bring to light the performance of those individuals that are good performers and those whose performance you will find rewardingly great! It will also bring to light those individuals whose performance is average or maybe very less than average – what you might consider underperformance. To move average performance along the continuum toward great performance, senior management must recognize the key agent of front line performance change – the manager. The success and effectiveness of the manager is the mechanism or superstructure on which real front-line change depends.

#### With You Really Count™, you will receive the following:

- Actual knowledge of customers' buying intentions so that you offer them the product choices that they really want.
- Web-based, actionable, customer-satisfaction survey data where nearly 40% of all survey respondents ask for information on products and services they are presently considering.
- Effective coaching tools for managers to accomplish improvements in back-office, and optionally, front-office performance.

#### You Really Count™ Indirect

##### Making the Most of the Indirect Customer

You Really Count™ Indirect is solving the national crisis of indirect lending pitfalls. By surveying the indirect customers, not only will you find out what type of service was provided, but you will gain invaluable information that can, and does, lead to new business. Generating leads for other products and services that may otherwise have gone somewhere else and also generating new customers by referral.

- Powerful transaction surveys detailing the indirect customer dealership experience.
- Proven solutions resulting in indirect customers as functioning financial institution customers
- Capturing an average 10% response rate from the indirect customer segment
- Connecting the financial institution to the new indirect lending customer resulting in actual relationships
- Nearly 50% of indirect customer respondents request other financial institution services information!

# The Internal Shop™

## Back-office Performance Measurement Program

### Maintaining Service Quality Has Never Been More Important!

#### What is The Internal Shop™?

The Internal Shop™ is an ongoing barometer of the internal service quality as assessed and reported through peers and co-workers.

#### With The Internal Shop™, you will receive the following:

- An internal, back-office measuring of critical, quality-related, issues including responsiveness, assurance, empathy, reliability and tangibles.
- Concise, web-based analysis enabling back-office, and optionally, front-line employees, to know the impact of their performance on other departments.
- Effective coaching tools for managers to accomplish improvements in back-office, and optionally, front-office performance.

#### How does The Internal Shop™ Work?

- Back-office and front-line departments are evaluated by the rest of the organization.
- Invitations are provided to all surrounding employees of the targeted back office/department.
- The Invitation will request their personal feedback on a set of group performance questions that all departments will be measured by.

#### Who is the Back Office?

The Internal Shop™ connects the link between internal service quality and employee engagement by measuring the following dimensions.

- |                      |                    |                        |
|----------------------|--------------------|------------------------|
| • Human Resources    | • Call Centers     | • Administration       |
| • Financial Services | • Marketing        | • Compliance           |
| • Accounting         | • Info Technology  | • ATM/Facilities       |
| • Commercial Lenders | • Indirect Lending | • Front-line Employees |

# **WorkLife!™**

**Employee Engagement Web-based Survey Program**

**Under Construction – To Be Released in 2011**

# The Ultimate Objective

To impact Customer Behavior

- You **RETAIN** their business
- They do **REPEAT** business with you
- They **REFER** you to family and friends

## Key Loyalty Factors

### Net Referral™

Net Referral is a key loyalty factor that can help predict a company's growth. The report analyzes whether customers would refer the financial institution based on their service experience. Net Referral is calculated by subtracting Detractors, the percentage of customers who indicated they would not refer the financial institution, from the percentage of Promoters, those who indicated they would refer the financial institution based on their service experience.

### Net RePurchase™

Repurchase is a key loyalty factor that refers to the percentage of customers who would bring their future business back to the financial institution based on their service experience. The Net Repurchase percentage is the repurchase percentage minus those who indicated they would not bring their future business back to the financial institution, based on their service experience.

### Emotional Connection™

The emotional connection report summarizes the customer's emotional connection to institution based on whether they "felt appreciated and valued as a customer." The possible responses for the emotional question were Yes (5), Indifferent (3), and No (1). For comparison purposes, your service score is also listed alongside your emotional connection score.



What Gets Measured – Gets Improved

# Bank Testimonials

We cordially invite you to join others who are successfully competing on service!

**Measuring over 200,000 Service Experiences nationwide and abroad!**

## **First American Bank, Oklahoma**

**assets \$300M**

"In my 22 years with First American Bank, the Support Financial Resources customer feedback program is the best investment our bank has made. The information I receive about employees performance from the customers point of view allows me to coach employees to continually improve their skills."

## **First Bank, Illinois**

**assets \$200M**

"The reporting website is easy to navigate and very informative. Everyone at Support Financial Resources is helpful and quick to respond when we have questions."

## **First Federal Savings Bank, Kentucky**

**assets \$800M**

"We could not be more thrilled with our Partnership with Service Experiences! Everything from the Branch Manager Training to the monthly reports have been perfect! Everyone is quite excited when the Customer Feedback Surveys are received. Even more importantly, it has given us in black and white what we are doing well and where we need to focus some attention. It's one thing to say "We have great customer service!" It's another to be able to prove it!"

# Credit Union Testimonials

We cordially invite you to join others who are successfully competing on service!

**Measuring over 200,000 Service Experiences nationwide and abroad!**

## **DFCU Financial, Michigan**

**assets \$2.5 Billion**

“The results are great. In one year, we have seen a significant improvement in our service and customer satisfaction.”

## **Nassau Educators Federal Credit Union, New York**

**assets \$1.3 Billion**

“Support Financial Resources helps us better monitor our front-line performance (things we don't always see) to ensure we meet our corporate goals, one of which is providing top-notch customer service.”

## **Seven Seventeen Credit Union, Ohio**

**assets \$750M**

“Support Financial Resources provides extensive actionable data of our customers' service perceptions.”

# The Billion Dollar Club

The nation's leading credit unions expect the finest in quality results. It is both an honor and a privilege to be on mission with a growing number of best-in-class credit unions that have partnered with Support to take the next step in intentionally and systematically measuring service and sales behaviors.

American Eagle Federal Credit Union  
East Hartford, CT – 1.1

DFCU Financial  
Dearborn, MI – 2.5

Eastman Credit Union  
Kingsport, TN – 1.9

Grow Financial Credit Union  
Tampa, FL – 1.7

Municipal Credit Union  
New York, New York – 1.5

Nassau Educators Credit Union  
Westbury, NY – 1.3

OnPoint Community Credit Union  
Portland, OR – 2.7

Star One Credit Union  
Sunnyvale, CA – 4.9

Veridian Credit Union  
Waterloo, IA – 1.6