

## Diagnostic Analysis

Where do you stand? Identify your current market position, plus opportunities for growth



Find out where you stand so you can plan where to grow. Using our proprietary research methods and in-depth analyses, you can pinpoint your position in a competitive industry, market and even individual households.

To set your credit union up for success, you need to understand its potential. A diagnostic analysis engagement with Raddon helps leaders set clear and realistic growth targets based on their credit union's current position and unique market dynamics.

The engagement includes a series of studies and surveys, overlapped with 30 years of industry data and trends. Armed with this information, credit union leaders can identify ideal strategies for growth.

### How It Works

Your diagnostic analysis engagement starts with an objective, data-driven review of your organization. We use unbiased information from your credit union, peers and the industry to set a baseline of your operational and financial performance.

We review branch performance, overall organizational efficiency and member satisfaction. Then we dig into account-level data to quantify your share of wallet among members and find areas to deepen member relationships.

Throughout our engagement, you'll have access to proprietary Raddon research on consumer and financial industry topics. You'll receive every new research study we release, plus access to past studies, webinars and expert analyses.

Credit unions leverage the diagnostic analysis to create new products and member segments, adjust pricing and improve profitability overall. Once you know where you stand, you can plan where to grow.

### What We Deliver

The diagnostic analysis engagement provides information you need to set clear and realistic growth targets for your credit union. Deliverables include:

- An extensive, custom performance and opportunity report, plus calculations of your potential earnings
- Benchmarks and peer comparisons to gauge your performance against national and peer group averages
- Member experience ratings, covering everything from loyalty and satisfaction to expectations surrounding new channels and technologies
- A comprehensive review of branch performance
- Ideal market segments based on generational and demographic profiles of your members
- Share-of-wallet metrics for your current households so you can identify organic growth opportunities
- Access to workshops, proprietary research reports, networking opportunities and industry experts



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On average, organizations with a highly loyal customer base perform 59 percent better in growth terms compared to those with lower loyalty.  
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Source: Raddon Loyalty Index results  
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Raddon has been providing financial institutions with research-based solutions since 1983. Since we work exclusively with financial institutions, we understand the industry and can apply our practical know-how to the unique challenges and opportunities financial institutions face. We combine best practices in research and analysis with consulting and technology solutions to help institutions achieve sustainable growth and improve financial performance.

### Key Benefits

A diagnostic analysis engagement with Raddon can help guide your credit unions through emerging issues and toward strategies that drive growth. Uncover ways to improve sales, the member experience, employee engagement and overall operational performance.

- Improve sales, revenue and margins
- Develop strategies and tactics to grow organically
- Understand member attitudes, expectations and preferences, plus barriers to sales
- Measure and enhance member engagement
- Build high-potential market segments and campaign messaging
- Identify opportunities to optimize branch locations
- Uncover and prioritize training needs

### Connect With Us

For more information about a diagnostic analysis engagement with Raddon, please contact us at 800-827-3500 or visit [www.raddon.com](http://www.raddon.com).



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