

Relationship Survey

Measure Customer Perceptions to Build Lasting Relationships and Improve Financial Performance



Savvy organizations understand that focusing on key metrics of the customer relationship helps facilitate growth. Raddon has found that the highest-performing institutions solicit customer feedback, measure their performance against their peers and adjust their offerings to effectively compete and meet customer needs. This continual cycle of feedback plus implementation of improvement initiatives, allows organizations to gain an edge within their markets and achieve strong financial performance.

Relationship Survey from Raddon is a comprehensive analysis of key factors impacting growth including:

- Demographics/Segmentation (Age, Income, Generational)
- Satisfaction, Loyalty and Potential
- Service Quality/Experience
- Share of Wallet
- Technology/Delivery

Raddon clients understand that consistent measurement and continual process improvements positively contributes to the financial health of the organization. We employ a proven survey instrument to assess performance in key research areas such as customer loyalty, experience and strength of the financial institution's brand. Subsequent correlation studies have continually proven we are asking the right questions of the right customers in the right way as we repeatedly see strong

correlation to performance as financial institution clients can effectively move the needle within these key metrics studied in the Relationship Survey.

Deliverables

A focused, in-depth discovery of your customers' opinions helps guide the development of your marketing and customer experience plans. Understanding your customers' attitudes on the quality of your service, which delivery channels they prefer, why they patronize your institution over another and how likely they are to recommend your services helps your management team prioritize their training efforts and uncovers areas of opportunity within your base.

The benefits of participating in a Relationship Survey from Raddon include:

- Reliable results using Raddon's proprietary sampling/weighting methodology.
- Informative findings report with graphs and tables including executive summary and full data tabs.
- Raddon's peer comparisons provide comprehensive benchmark data to gauge your performance to national and peer group averages.
- Raddon's actionable survey findings uncover strategic and tactical opportunities that will help your organization improve their performance.
- Raddon's expert Strategic Advisors help your management team interpret the analysis and provide recommendations on actionable next steps.

What to Expect When You Join

Upon joining the Relationship Survey program, your organization is assigned to a Market Research Analyst that will guide you through the process of conducting your research. Once results are processed, a review of results is facilitated by a Raddon Strategic Advisor and your management team.

Raddon's objective is to provide organizations with a comprehensive understanding of their customer base. Research findings include an analysis of the following:

Segmentation

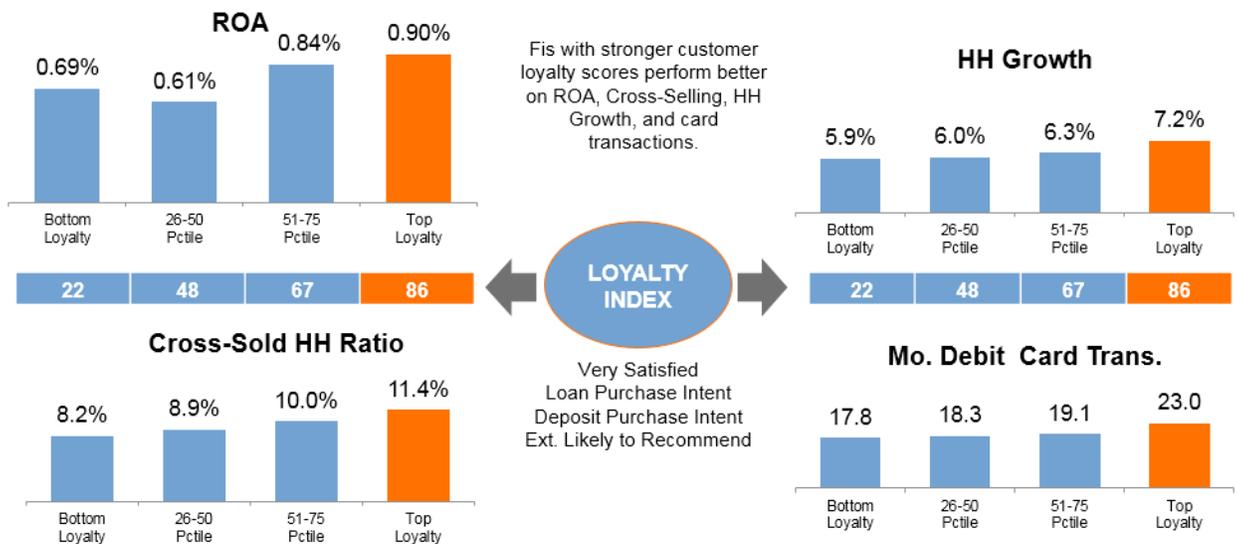
The combination of the simple age and income measurements creates the

powerful Raddon Consumer Segments. This segmentation provides valuable insight for sales potential and target marketing opportunities. Additionally, Raddon provides other segmentation options to better understand opportunities for select groups like generational segments, primary segments and high tech.

Loyalty & Satisfaction

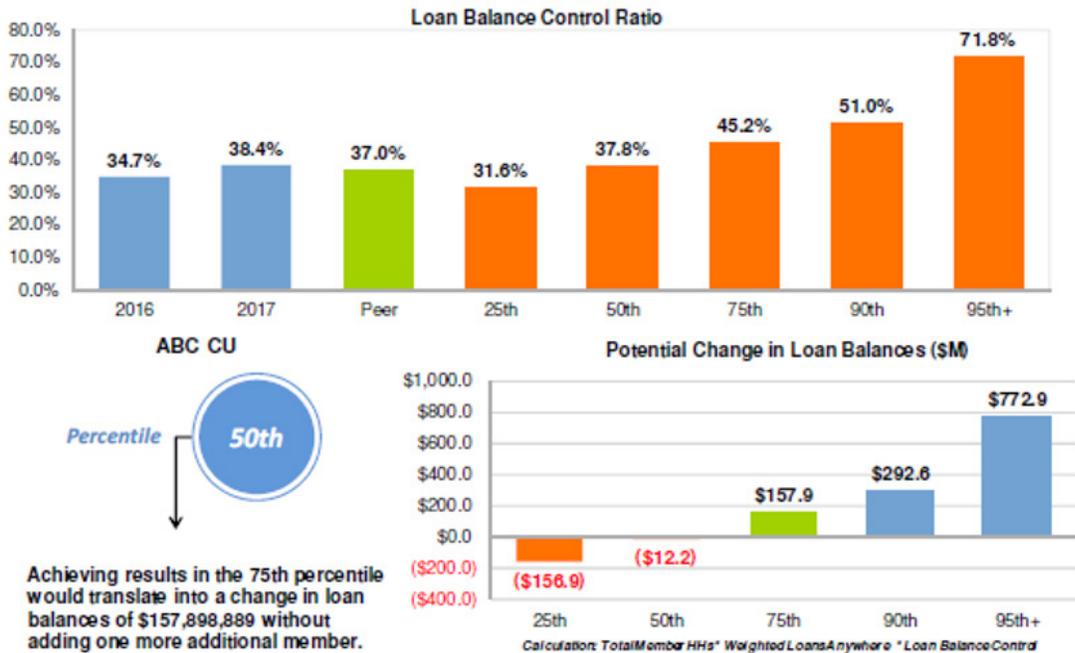
Raddon's proprietary methods of measuring customer loyalty results in higher household growth rates. Our comprehensive Raddon Loyalty Index is unique for the financial services industry and goes beyond NPS – encompassing both retention and growth (additional balances as well as households).

Raddon Loyalty Index



Source: Raddon Performance Analytics & Relationship Survey

Example Loan Balance Control Ratio Report



Survey Research Best Practices Employed

Provide unbiased results that are representative of your entire customer base

Raddon has continually refined its proprietary research methodology to meet the changing patterns of demographics and consumer behaviors. Our unique sampling and weighting techniques ensure an accurate and predictive representation of your entire customer base while eliminating traditional bias of simple "random sample" surveys.

Ensure results are measurable

Performing a customer or employee survey in-house or through an outside research firm with no industry experience can lead to arbitrary data that is not very telling to actual performance. Raddon's peer comparisons and comprehensive benchmark data instantly provide that added layer of perspective necessary to truly gauge performance. Group, Peer and

High Performer benchmarks are provided throughout the reporting.

Elicits actionable items to effectively move the needle within key metrics

Raddon's survey findings provide strategic direction and point to tactical opportunities that will help your financial institution improve sales, your customers' experience, employee engagement and overall operational performance.

Provide research objectives that are relevant to the ever-changing financial services industry

Raddon addresses the emerging issues affecting financial institutions and their customers. The specific programs within Raddon's suite of survey solutions are updated each year with vital, timely, industry-pertinent research objectives.



Raddon has been providing financial institutions with research-based solutions since 1983. Because 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.

Does Relationship Survey Work?

On average, Raddon clients participating in the Relationship Survey program perform 25% better than those that do not. In addition to fostering customer engagement, these institutions understand that focusing on key metrics that facilitate growth has a very positive impact on their financial performance.

Our proprietary measurements have proven correlations to financial performance. Clients who demonstrate to have a highly-loyal customer base (as measured by their Raddon Loyalty Index score) tend to perform 59% better in terms of growth, on average, than those showing lower-levels of customer loyalty



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Connect With Us

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