

Gather valuable insight for informed CX decisions.



Custom Research Studies

Questions we can help you answer

- ▶ **Who are our main competitors?**
- ▶ **Why do consumers choose our competition?**
- ▶ **How does our brand image compare with the brand image of our competitors?**
- ▶ **What does a specific segment look for in a financial institution?**
- ▶ **What kind of products appeal to a specific segment?**
- ▶ **What is the source of attrition at our financial institution?**

Unfortunately, most financial institutions lack the specialized expertise to design and implement the kind of complex data collection and analysis to effectively meet their goals and objectives. Fewer still have access to advanced surveying software required to efficiently execute a research plan. Building a relationship with a knowledgeable partner can help you extract the data you need to inform your decision making and reach your business goals.

Why choose Harland Clarke?

Harland Clarke's InsightCX™ delivers research solutions that help you obtain actionable data, analysis and consultation tailored your institution's unique objectives. With more than 145 years of industry experience, we are properly positioned to understand your unique goals, challenges and opportunities. Through our work with financial institutions, we have refined our research design and methodology to deliver the precise insight you need. And because insight without action is insufficient, we also provide a detailed action plan to serve as a roadmap to measurable results toward your CX goals.

Examples of our custom market research options

Customer Relationship Assessments deliver a complete understanding of your customer relationships with a 360 degree view of your customer to improve loyalty. The comprehensive reporting and analysis includes benchmarking so you're able to compare your key metrics to industry peers and employee scorecards to coach and train your employees.

Customer Attrition And Retention Assessments provide a window into the customer relationships to help improve retention rates so you can focus on workable solutions to reduce customer attrition.

Brand Awareness Study presents market intelligence that delivers awareness positioning, your current status in the marketplace, and an understanding of the perceptual strengths and weaknesses in your environment.

Commercial Account Prospecting provides a customized database of small business and commercial prospects, including detailed profiles of prospects that are designed to increase new business acquisition efficiencies and provide an immediate revenue stream.

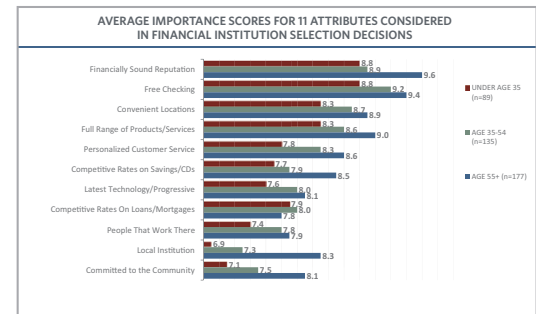
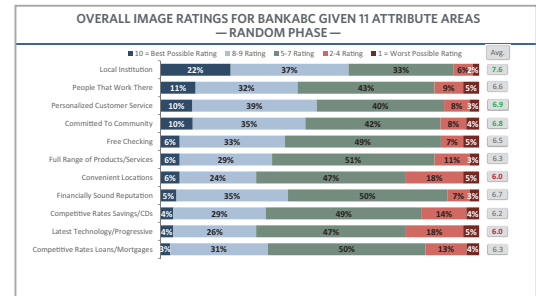
Internal Service Assessment shares an in-depth look at employee attitudes and behaviors you can use to build workforce satisfaction for increased employee retention and an improved customer experience.

The road to outstanding CX begins here

Your customer experience is your most valuable asset. Protect it with a clear understanding of your institution's customer experience opportunities and challenges. Let Harland Clarke's innovative research solutions deliver the insight you need to develop your path to increased revenue, retention and profitability.

Sample study findings

VOLUNTEERED KEY REASONS	RANDOM SAMPLE (n=401)		CUSTOMER SAMPLE (n=183)	
	Unaided Mention	Aided Mention	Unaided Mention	Aided Mention
Convenient Locations	28%	63%	26%	90%
Long-Term Experience/Family Experience	21%	--	23%	--
Local Institution	12%	--	23%	--
Customer Service	10%	31%	23%	53%
Reputation/Trust	10%	14%	3%	85%
The People There/Friendly/Know	7%	62%	17%	89%
Competitive Rates	7%	63%	9%	68%
Low Fees	5%	70%	3%	86%
Products/Services	4%	64%	16%	81%
Direct Deposit Goes There/ Business Uses	4%	--	--	--
Progressive/Technology	3%	50%	2%	58%
Recommendation	3%	57%	2%	52%
Free Checking	3%	--	--	--
Offered Rewards/Sign Up Bonus	2%	--	--	--
Member Owned/Credit Union	2%	--	--	--
Community Involvement	1%	46%	1%	62%



Obtain the data and analysis you need to build a customer experience program that drives loyalty and drives revenue.

Call 1.800.351.3843
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 Visit harlandclarke.com/InsightCX