



# PeopleMetrics

## VoC for Banks & Credit Unions™

Real-Time Feedback for Consistent Customer & Member Experiences



PeopleMetrics helps banks & credit unions collect real-time feedback and improve the banking experience



### Measure VoC Across Touchpoints

Collect survey feedback on key customer touchpoints such as online banking, ATM usage, and in-branch experiences



### Real-Time Analytics

View and analyze customer feedback to the minute using PeopleMetrics' secure analytics platform



### Real-Time Notifications

Receive instant notifications when customers report negative experiences to identify at-risk customers



### Integration

Easy integration with marketing automation and CRM software



### Industry Benchmarks

Gain access to industry benchmarks by including PeopleMetrics' best practice survey questions



### Empower The Organization

Keep your entire organization connected to real-time feedback with our unlimited access module

*"PeopleMetrics is a reliable source for feedback from our customers. It provides insights about our strengths and weaknesses as a company, and helps keep track of the scores we need to maintain and improve."*



Trusted Customer Experience Partners

[www.peoplemetrics.com](http://www.peoplemetrics.com)

Contact us to get started today:  
[connect@peoplemetrics.com](mailto:connect@peoplemetrics.com)

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## Case Study

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A mid-western bank instituted a continuous listening Voice of Customer (VoC for Banks & Credit Unions™) program in order to collect post-transactional feedback from customers across multiple touchpoints. **The bank wanted to utilize feedback from the new loan/new account customers to determine if their existing up-sell/cross-sell strategy of providing these customers with information about other product offerings during their loan application/account opening process was working.** The assumption was that distributing product brochures to new customers during this “captive” time could drive more product sales. The bank was interested in determining if this was indeed the case.



### Our Approach

PeopleMetrics incorporated specific survey questions into the existing VoC for Banks & Credit Unions™ program to **measure the experience of customers who had recently met with a loan/customer service officer.** The questions were intended to determine if customers received product brochures, recalled some of the information in the brochures, and were more knowledgeable about product offerings.



### Key Insights

PeopleMetrics monitored ongoing customer feedback and determined that **customers applying for loans were not interested in and even annoyed by receiving product brochures while working through their loan transaction.** While some customers expressed polite interest in other offerings, they were primarily concerned with the bank's ability to service their loan – the reason they walked in the door in the first place. Customers wanted the bank to focus on their loan, not new product sales.



### Actions Taken

**By listening to ongoing customer feedback, the bank changed their sales tactics during loan applications.** Rather than attempting to push their offerings to a captive yet uninterested audience, **the bank focused on servicing the customer needs first, and then following up 60 days later with loan-approved customers by sending them product brochures.** Data showed that **customers were more receptive to hearing about other product offerings at this time.** Through continuous listening the bank was able to refine its up-sell strategy while maintaining a positive customer experience.