

/ CUSTOM RESEARCH STUDIES

Gather and use custom research insight
to Improve customer experience



Custom survey research, data and analysis tailored to meet your specific needs provide critical insight to make informed decisions that help you stand out in a highly competitive market.

Most financial institutions, however, lack the specialized expertise to design and implement the kind of complex data collection and analysis to effectively meet their goals and objectives.

WHY VERICAST FOR CUSTOM RESEARCH AND ANALYSIS

Custom Research Studies from Vericast combines our industry expertise and acute awareness of the financial services market with groundbreaking innovation powered by Customer Service Profiles (CSP) to plan, implement and deliver a custom research program that fits your institution's goals and budget.



Here are **six examples** of recent custom research studies conducted with the help of Vericast:

01 Brand Awareness and Image Positioning Study

GOALS

Grow credit union membership by:

- Comparing its brand awareness to key competitors
- Learning how consumers in their service area view its brand
- Determining how much its name is a barrier for member growth

RESULTS

- Identified the credit union's primary competitors
- Measured brand perception, strengths and weaknesses within its market
- Delivered a barrier gap analysis of its name and desired member growth goals

02 Customer Sentiment and Usage Analysis of Interactive Teller Machines (ITMs)

GOALS

Survey current retail customers in select markets to:

- Determine whether to increase the number of ITMs
- Learn the best locations for new ITMs

RESULTS

- Detected educational efforts needed due to low customer awareness of ITMs
- Learned which demographic groups, in which markets and locations, used? and had the most interest in ITMs
- Identified best markets and location for additional ITMs
- Revealed ITM features and capabilities that most appealed to customers for creating more relevant and effective marketing promotions

Welcome, Lia !

Let's get started >

03

Business Banking Pulse Check

GOALS

Conduct a business banking relational study to:

- Check in on the needs of business customers
- Establish regular engagement intervals for gathering feedback and tracking trends
- Create a dimension of time-related results analysis

RESULTS

- Provided institutions with a relationship health assessment of business customers
- Informed of utilization and satisfaction levels of products and services
- Verified customers' primary contact and measured the level of service received
- Created opportunity for additional questions to gather additional feedback, i.e., topics of interest, etc.

04

COVID-19 Lobby Reopening Preferences

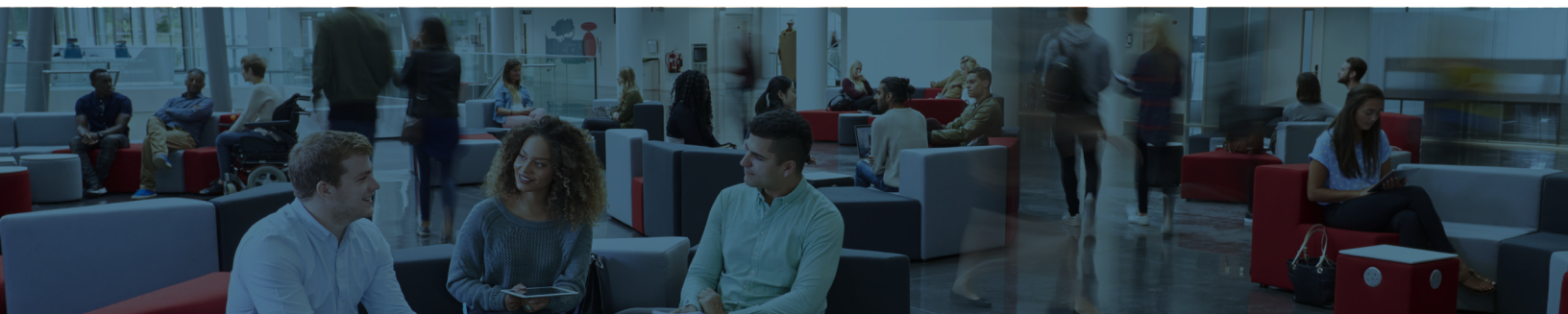
GOALS

To guide the planning and implementation of lobby reopening strategies, conduct a survey of consumers to understand:

- COVID-19 safety precautions that provide the most comfort to consumers
- How COVID-19 has impacted consumers' relationship with their financial institution

RESULTS

- Identified COVID preventative measures with the most positive impact
- Set expectations for lobby traffic during reopening
- Revealed number of households reporting negative financial impact from COVID-19
- Provided extent of increase in use online and mobile banking tools



Q5

Consumer Banking Pulse Check

GOALS

Conduct a survey on regular intervals to:

- Check in on the needs of customers/ members
- Establish regular engagement intervals for gathering feedback and tracking trends
- Create a dimension of time-related results analysis
- Identify opportunities for improvement

RESULTS

- Provided institutions with a relationship health assessment of customers/ members
- Informed of utilization and satisfaction levels of products and services
- Assessed the impact of mergers and acquisition on customers/ members
- Delivered valuable brand perception feedback
- Created opportunity for additional questions to gather additional feedback, i.e., topics of interest, etc.

Q6

Ad Testing

GOALS

Test a checking account offer across several states to:

- Determine areas with the highest response rate
- Value the importance of select elements of the offer

RESULTS

- Determined regionality had no effect on offer response rates
- Identified most/least important features among recipients by segment



Get custom research and insight that fuels better customer experience

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

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Obtain the custom data and analysis you need to build a customer experience program that drives loyalty and revenue. Email us at contact@vericast.com